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OBJECTIVES

This study was conducted to provide a fuller understanding of the process involved in companies' decisions to buy various types of office products and systems. The following questions were explored:

-- Which types of office products and systems are being used now and how recently were they purchased?

-- What is the competitive brand framework for various types of office products and systems?

-- How important is the target market's opinion in the decision to purchase various types of office products and systems?

-- How knowledgeable is the target market about various types of office products and systems?

-- What specific factors are important in the decision to purchase various types of office products and systems?

-- Who is involved in the various stages of the decision-making process to purchase various types of office products and systems?

-- What sources would a company use to buy various types of office products and systems?

METHOD

A random sample of 1500 FORTUNE subscribers were surveyed. Since FORTUNE subscribers work in companies that use a wide variety of office products and systems and are likely to be in positions that influence purchase decisions about these types of products and systems, FORTUNE subscribers serve as a useful population for more fully understanding the prime target market.

Respondents were mailed an eight-page questionnaire with a cover letter from the publisher of FORTUNE printed on the first page, a stamped return envelope addressed to FORTUNE, and a $1 incentive. A reminder postcard was sent out three days later. In addition to the dollar incentive, respondents were offered the opportunity to participate in a sweepstakes to win $1,000. FORTUNE was identified as the sponsor of this investigation in order to boost response rate. There was no reason to expect that FORTUNE's sponsorship of this research would influence the findings since questions regarding FORTUNE were not asked. A copy of all mailing materials is contained in the Appendix.

The survey covered 11 different types of office products and systems:

-- Mainframe computers
-- Mini-computers
-- Personal computers
-- Personal computer software
-- Laser printers
-- Dot matrix printers
-- Desktop publishing systems
-- Local area networks
-- Telecommunication systems and equipment
-- Dictating equipment
-- Office copiers

The response rate to the survey was relatively low -- 31% (a yield of 469 returns out of 1500 mailed). Telephone interviews were conducted with 100 non-respondents on several key questions, and the responses from the two samples -- respondents to the mail survey and non-respondents to the mail survey who were interviewed by telephone -- were combined to reflect the entire population surveyed.

Respondents to the mailed survey closely resemble the population estimate in terms of company usage of office products and systems, decision-making influence, knowledgeability and demographic profile. The one marked difference occurred in ownership of dot matrix printers -- 69% of respondents to the mail survey report that their companies have them compared to the 56% estimated for the entire sample population. In this particular instance, it is safe to say that respondents may have not fully understood the definition provided and may have confused dot matrix printers with something else.

The results from the mail survey are so similar to the results of the combined groups that it is possible to report the mail results without incurring bias due to a low return rate. (See the Appendix for supporting tables.)

The questionnaire was mailed out on June 17, 1987, and the cut-off date was August 31, 1987, seven weeks later. Beta Research Corporation, an independent research company located in Syosset, New York, handled all fieldwork and tabulations and the telephone follow-up interviews.

SUMMARY OF RESULTS

In order to gain perspective on the data presented in this report, it is useful to compare the 11 types of office products and systems on the key issues.

- Company usage of the office products and systems studied range from a high of 88% for office copiers down to a low of 33% for the recently introduced desktop publishing systems.

- With the exception of mainframe computers, the majority of respondents (57% up to 90%) report that over the past two years their companies have been actively investing in each of the office technology and telecommunication systems studied. Since mainframe computers are a considerable capital expense, it is not surprising that these are not bought as frequently as the others.

COMPANY USE OF AND PURCHASE RECENCY
FOR OFFICE PRODUCTS AND SYSTEMS

	Company Uses (469)	Purchased In Past Two Years Among Those Who Have
Mainframe computers	44%	43%
Mini-computers	55	64
Personal computers	80	90
Personal computer software	76	90
Laser printers	45	79
Dot matrix printers	69	79
Desktop publishing systems	33	66
Local area networks	47	57
Telecommunication systems and equipment	61	67
Dictating equipment	49	60
Office copiers	88	73

- Respondents report that they are <u>most</u> knowledgeable about office copiers (83%), personal computers (75%) and personal computer software (66%). They are <u>least</u> knowledgeable about mainframe computers (28%) and desktop publishing systems (23%). Thus, for some office products and systems, manufacturers need to get their message across to an already educated target market. And, for others, manufacturers need to educate prospects and reinforce recognition of their brand.

- Almost one-half or more respondents report that they are influential in their company's decision to purchase office products and systems. The lowest level of influence was reported for mainframe computers (39%).

- Top management has an even more substantial influence on companies' decisions to purchase the 11 office products and systems studied.

- Respondents in smaller sized companies (under 100 employees) are considerably more influential in their companies' office equipment purchase decisions than those in larger sized companies (100 or more employees).

KNOWLEDGEABILITY AND INFLUENCE
IN THE PURCHASE-DECISION PROCESS

	Very/Fairly Knowledgeable About This Product/System (469)	Opinion Is Very/Fairly Important In Company Purchase Decision (469)
Mainframe computers	28%	39%
Mini-computers	44	46
Personal computers	75	65
Personal computer software	66	64
Laser printers	36	50
Dot matrix printers	56	51
Desktop publishing systems	23	45
Local area networks	31	45
Telecommunication systems and equipment	45	49
Dictating equipment	49	45
Office copiers	83	57

DEMOGRAPHIC PROFILE OF INFLUENTIAL PURCHASE DECISION-MAKERS

	Opinion Is Very/Fairly Important in Company Purchase Decision For:										
	Mainframe Computers	Mini-Computers	Personal Computers	PC Software	Laser Printers	Dot Matrix Printers	Desktop Publishing Systems	Local Area Networks	Telecommunication Systems/Equipment	Dictating Equipment	Office Copiers
Total	39%	46%	65%	64%	50%	51%	45%	45%	49%	45%	57%
Job Title Or Position											
Top Management	57	64	81	78	66	66	64	65	67	67	76
Company Size											
Under 100 employees	58	67	84	82	73	71	70	66	71	67	80
100 or more employees	26	31	53	52	35	38	29	32	35	31	41

- The vast majority of respondents indicate that their companies are receptive to purchasing the office products and systems asked about.

- Respondents indicate that the preferred source for purchasing office products and systems is directly from the vendor. In second place are manufacturers' representatives, independent dealers, distributors, and retail stores. The least preferred source is value-added resellers. Smaller sized companies (under 100 employees) are generally not as firm in their preference for buying office products and systems directly from the vendor.

PURCHASE RECEPTIVITY AND PREFERRED SOURCES
FOR OFFICE PRODUCTS/SYSTEMS

	Would Purchase This Type Of Office Equipment (469)	Source Would Purchase From: Directly From Vendor	Manufacturer's Representative	Independent Dealer	Distributor	Retail Store	Value-Added Reseller
Mainframe computers	76%	26%	11%	4%	3%	1%	2%
Mini-computers	88	29	18	6	5	4	4
Personal computers	97	27	18	19	17	15	9
Personal computer software	97	25	17	21	20	22	8
Laser printers	92	21	16	13	12	11	8
Dot matrix printers	94	22	16	15	14	12	7
Desktop publishing systems	87	19	10	8	9	7	6
Local area networks	87	20	12	6	6	5	5
Telecommunication systems/equipment	92	28	13	6	7	4	5
Dictating equipment	86	16	13	11	11	12	3
Office copiers	98	30	19	12	14	8	4

DEMOGRAPHIC PROFILE

- Close to 5 out of 10 respondents (46%) are at the top management level and 3 out of 10 respondents (34%) are at the middle management and professional levels.

JOB TITLE OR POSITION

	Total (469)	
Top Management	46%	
Chairman of the Board, President, CEO		12
Vice President		9
MIS Director		2
Chief Information Officer		1
Other Company Officer or General Manager		9
Owner, Partner		14
Other Management	22	
Professional	12	
Salesperson, Broker, Agent, Representative	8	
Trainee, Office Worker, Production Worker	3	
Skilled Craftsman, Laborer	4	
Student	--	
Retired	4	
Housewife	--	
No answer	1	

- About 4 out of 10 respondents (36%) are employed in the industrial sector of the work force, while 6 out of 10 respondents (60%) are employed in the service sector. Very few -- 3% -- could not be classified.

- The full range of company sizes were represented. For purposes of analysis, the sample was divided into two comparable segments -- those who work in larger sized companies with 100 or more employees (57%) and those who work in smaller sized companies with under 100 employees (41%).

PRINCIPAL ACTIVITY OF COMPANY

	Total (469)
Industrial	36%
Manufacturing, processing, publishing	23
Transportation, communications, utilities	7
Mining, oil or gas extraction	1
Construction	5
Service	60
Banking, finance, insurance, real estate	18
Wholesale or retail trade	14
Education	4
Professional or business services	23
Government	1
Other	1
No answer	2

NUMBER OF EMPLOYEES IN ENTIRE CORPORATION OR FIRM

	Total (469)
Less than 25 employees	29%
25 - 49 employees	7
50 - 99 employees	5
100 - 249 employees	6
250 - 499 employees	6
500 - 999 employees	6
1,000 - 4,999 employees	13
5,000 - 9,999 employees	5
10,000 or more employees	21
No answer	3

MAINFRAME COMPUTERS

RESULTS

Mainframe computers were defined to the respondent on the questionnaire as large, complex computer installations.

Current Usage

- Mainframe computers are one of the lesser-owned types of office products and systems surveyed. About 44% of respondents report that mainframe computers are in current use in their companies.

- Not surprisingly, larger sized companies (100 or more employees) are overwhelmingly more likely to have mainframe computers than smaller sized companies (under 100 employees) -- 69% versus 10%.

- About 4 out of 10 respondents in companies with mainframe computers (43%) report that the purchase of this equipment occurred in the past two years. This purchase recency is considerably lower than that seen for other office products and systems studied, and again, is not surprising given the capital expense required. This finding may be slightly overstated, however, because 30% of respondents were unsure or unable to respond to this question.

Brand Usage

- In companies with mainframe computers, the leading brand is IBM (63%). Lagging far behind IBM -- and used by just less than 15% -- is Digital Equipment Corporation (DEC). Other brands are used by 5% or less of the companies:

	Have Mainframe Computers
IBM	63%
DIGITAL EQUIPMENT CORPORATION (DEC)	14
CONTROL DATA CORPORATION (CDC)	5
HEWLETT-PACKARD	5
NCR	4
UNISYS	3
AT&T	3
HONEYWELL BULL	3
AMDAHL	2
TANDEM COMPUTERS	2
PRIME COMPUTER	1

It is possible that brand usage is related to brand awareness, such that people recall more easily the brands that are most familiar to them. Low usage scores may therefore be reinforced or exacerbated by low awareness. If this is true, it suggests an even greater need to build brand awareness for low incidence brands.

Ownership of Other Office Products and Systems

- Companies that have mainframe computers are also big users of other types of office products and systems:

	Have Mainframe Computers
Office copiers	99%
Personal computers	88
Personal computer software	86
Dot matrix printers	80
Telecommunication systems/equipment	75
Mini-computers	74
Local area networks	70
Dictating equipment	65
Laser printers	65
Desktop publishing systems	45

Purchase-Decision Process

- About 4 out of 10 respondents (39%) report that their opinion is very or fairly important in their company's decision to purchase mainframe computers.

- Compared to total respondents, top management is more likely to be involved in the decision process for the purchase of mainframe computers (39% for total respondents versus 57% for top management).

  Those in smaller companies also play a bigger role in the purchase-decision process than those in larger companies (58% versus 26%).

  Respondents in the wholesale or retail trade (57%) and respondents in professional or business services (45%) are above-average in their involvement in their companies' decisions to purchase mainframe computers.

- Only about one-quarter of respondents (28%) believe that they are knowledgeable about mainframe computers. This knowledgeabililty score is among the lowest for the 11 types of office products and systems studied. Those whose opinion counts in the company decision to purchase mainframe computers are only somewhat more knowledgeable (39%).

- Involvement in the decision-making process is fairly constant at all stages of the purchase decision, increasing slightly when the need for the computer is determined:

Initiation	24%
Specification	19
Evaluation	22
Recommendation	18
Authorization	20

- A greater role in each of the stages of the decision-making process to buy mainframe computers is played by those in smaller sized companies than those in larger sized companies. This is undoubtedly because job responsibilities in larger sized companies are more specialized than they are in smaller sized companies.

Factors Important in the Decision to Buy Mainframe Computers

- Three-fourths of companies (76%) would consider purchasing mainframe computers. This figure jumps up to 94% in larger sized companies.

- The most important factors -- indicated by about 2 out of 10 respondents -- in the decision to buy mainframe computers are:

Manufacturer's reputation	22%
Service	21
Reliability	21
Performance	20
Price	18
Ease of use	18

Clearly, brand reputation and dependability are critical to brand selection.

- The least important factors -- considered by less than 1 out of 10 respondents -- are:

Current product/system is obsolete	9%
Noise level	7
American-made	5
Brand loyalty	4
Appearance	4
Always replace after a certain period of time	3

How mainframe computers look, how they sound and where they are made do not close the deal. And, importantly, disregard for brand loyalty in this product area could be of critical importance for manufacturers.

Sources

- If mainframe computers were to be considered for purchase, respondents report that they would be most apt to buy them directly from the vendor (26%). Manufacturers' representatives run a distant second (11%), although for smaller sized companies, manufacterers' representatives are as likely a source as the vendor (9% versus 9%).

Directly from vendor	26%
Manufacturer's representative	11
Independent dealer	4
Distributor	3
Value-added reseller	2
Retail store	1

CONCLUSION

Respondents play an important role in their companies' decisions to purchase mainframe computers. Top management respondents play an even greater role. At the same time, respondents who are influential in the decision-making process are also not very knowledgeable about the equipment.

Brand loyalty was not found to be as strong here as it is for other types of products in the marketplace. By increasing awareness of low incidence brands, manufacturers may be in a better position to persuade prospective buyers to switch from one brand to another.

WHETHER COMPANY CURRENTLY USES
MAINFRAME COMPUTERS

	Total (469)	Company Size: < 100 (187)	100 + (269)
Currently used	44%	10%	69%
Not currently used	41	71	22
No idea at all	6	5	6
No answer	9	14	4

WHETHER PURCHASED MAINFRAME COMPUTERS
IN THE PAST TWO YEARS

	Have This Office Product/System:		
		Company Size:	
	Total (206)	< 100 (19)*	100 + (185)
Yes, purchased	43%	47%	43%
No, not purchased	26	50	24
No idea at all	24	--	27
No answer	6	9	6

*Less than 20 respondents

BRAND NAMES OF MAINFRAME COMPUTERS
CURRENTLY USED IN COMPANY

	Have This Office Product/System (206)
IBM	63%
DIGITAL EQUIPMENT CORPORATION (DEC)	14
CONTROL DATA CORPORATION (CDC)	5
HEWLETT-PACKARD	5
NCR	4
UNISYS	3
AT&T	3
HONEYWELL BULL	3
AMDAHL	2
TANDEM COMPUTERS	2
PRIME COMPUTER	1
Other	6
No idea at all	14
No answer	4

OTHER OFFICE PRODUCTS/SYSTEMS USED
BY COMPANIES THAT CURRENTLY USE MAINFRAME COMPUTERS

	Have Mainframe Computers (206)
Office copiers	99%
Personal computers	88
Personal computer software	86
Dot matrix printers	80
Telecommunication systems and equipment	75
Mini-computers	74
Local area networks	70
Dictating equipment	65
Laser printers	65
Desktop publishing systems	45

IMPORTANCE OF RESPONDENT'S OPINION IN COMPANY DECISION
TO PURCHASE MAINFRAME COMPUTERS

	Total (469)	Company Size: < 100 (187)	Company Size: 100 + (269)	Top Management (214)
Very important	25%	43%	13%	43%
Fairly important	14	16	13	15
Not too important	18	13	22	15
Not at all important	29	11	42	14
No idea at all	9	9	8	7
No answer	6	9	2	7

DEMOGRAPHIC PROFILE OF PURCHASE DECISION-MAKERS
FOR MAINFRAME COMPUTERS

	Opinion Is Very/Fairly Important In Purchase Decision
Total	39%
Under 100 employees	58
100 or more employees	26
Principal Activity of Company	
Industrial	
Manufacturing, processing, publishing	35
Transportation, communications, utilities	32
Mining, oil or gas extraction	37*
Construction	42
Service	
Banking, finance, insurance, real estate	33
Wholesale or retail trade	57
Education	26
Professional or business services	45
Government	19*
Job Title or Position	
Top Management	57
Chairman of the board, president, CEO	69
Vice president	39
MIS director	43*
Chief information officer	73*
Other company officer or general manager	38
Owner, partner	73
Other management	27
Professional	29
Salesperson, broker, agent, representative	12
Trainee, office worker, production worker	23*
Skilled craftsman, laborer	7*

*Based on less than 20 respondents.

KNOWLEDGE ABOUT MAINFRAME COMPUTERS

	Total (469)	Opinion Is Very/Fairly Important In Purchase Decision (185)	Top Management (214)
Very knowledgeable	6%	8%	4%
Fairly knowledgeable	22	31	21
Not too knowledgeable	40	39	42
Not at all knowledgeable	27	22	29
No answer	5	1	4

RESPONDENT INVOLVEMENT IN DECISION TO PURCHASE
MAINFRAME COMPUTERS

	Total (469)	Opinion Is Very/Fairly Important In Purchase Decision (185)	Company Size: ≤ 100 (187)	Company Size: 100 + (269)	Top Management (214)
Initiation	24%	49%	41%	13%	38%
Specification	19	38	29	13	28
Evaluation	22	48	36	14	34
Recommendation	18	39	30	10	29
Authorization	20	46	38	9	42
Not at all involved	47	11	25	64	29
No answer	10	7	12	5	9

WHETHER COMPANY WOULD PURCHASE
MAINFRAME COMPUTERS

	Total	Opinion Is Very/Fairly Important In Purchase Decision	Company Size:	
			< 100	100 +
	(469)	(185)	(187)	(269)
Company would purchase	76%	67%	49%	94%
Company would never purchase	24	33	51	6

IMPORTANCE OF VARIOUS FACTORS IN DECISION TO PURCHASE
NEW MAINFRAME COMPUTERS

	Total (469)	Opinion Is Very/Fairly Important In Purchase Decision (185)	Company Size: < 100 (187)	Company Size: 100 + (269)
Manufacturer's reputation	22%	45%	25%	22%
Service	21	44	26	19
Reliability	21	42	23	20
Performance	20	39	23	18
Price	18	37	21	17
Ease of use	18	36	23	15
Cost of ownership including service and training	17	36	22	15
Expandability/ability to upgrade	17	33	17	17
Compatibility with existing systems	17	33	18	17
Durability	16	34	21	14
Quality	16	32	20	14
Special features	15	30	17	15
Memory size	15	30	19	14
Support staff recommendations	15	28	14	15
Speed	14	27	14	14
Expert opinion	13	29	16	11
Networking ability	13	25	13	13
Connectivity	11	22	12	11
Current product/system is obsolete	9	20	11	8
Noise level	7	15	10	5
American-made	5	11	6	4
Brand loyalty	4	9	5	4
Appearance	4	8	6	3
Always replace after a certain period of time	3	6	4	3

SOURCE WOULD USE TO PURCHASE MAINFRAME COMPUTERS

	Total (469)	Opinion Is Very/Fairly Important In Purchase Decision (185)	Company Size: ≤ 100 (187)	Company Size: 100 + (269)
Directly from vendor	26%	24%	9%	39%
Manufacturer's representative	11	15	9	13
Independent dealer	4	7	4	4
Distributor	3	7	5	3
Value-added reseller	2	5	4	2
Retail store	1	2	3	1
No idea at all	23	9	11	31
No answer	14	13	15	10

MINI-COMPUTERS

RESULTS

Mini-computers were defined to the respondent on the questionnaire as mid-range computers for medium-to-high level computational applications.

Current Usage

- Almost 6 in 10 respondents (55%) report that their companies currently have mini-computers. Ownership of this particular product is not as high as ownership of personal computers, and not as low as mainframe computers.

- As expected, larger sized companies (100 or more employees) are twice as likely to have mini-computers as smaller sized companies (under 100 employees) -- 70% versus 34%.

- A majority of respondents' companies (64%) have bought their mini-computers in the past two years. This fairly high level of purchase recency implies that companies are now in the market for mini-computers and are investigating what mini-computers can do for their businesses.

Brand Usage

- Among companies that have mini-computers, IBM is at the top of the list (43%). At a considerably lower level are Digital Equipment Corporation (17%), Hewlett-Packard (12%) and Wang (11%). Other brands are used by 5% or less of the companies:

	Have Mini-Computers
IBM	43%
DIGITAL EQUIPMENT CORPORATION (DEC)	17
HEWLETT-PACKARD	12
WANG	11
DATA GENERAL	5
BURROUGHS	4
NCR	4
INTERGRAPH	3
PRIME COMPUTER	2
MODCOMP	--
CONTROL DATA CORPORATION (CDC)	--
GOULD	--

Since people may recall more easily the brands that they are most aware of, some of the low incidence brands of mini-computers may have usage levels that are, in truth, higher. If this is so, efforts to build brand awareness for these low incidence brands is critical.

Ownership of Other Office Products and Systems

- While office copiers are omnipresent, companies with mini-computers are also heavily into other medium to small computerized information technology such as personal computers (88%) and accompanying software (86%). Companies with mini-computers are also very likely to be equipped with the other office products and systems surveyed:

	Have Mini-Computers
Office copiers	95%
Personal computers	88
Personal computer software	86
Dot matrix printers	77
Telecommunication systems/equipment	73
Local area networks	63
Dictating equipment	62
Laser printers	61
Mainframe computers	60
Desktop publishing systems	43

Purchase-Decision Process

- Close to one-half of the respondents to this survey (46%) report that their opinion is of importance in their companies' decisions to purchase mini-computers.

  Respondents in top management levels play a larger role in their companies' decisions to purchase mini-computers (64% versus 46% for total respondents).

  Respondents in smaller sized companies are more likely than those in larger sized companies to have an influence in their companies' decisions to buy mini-computers (67% versus 31%).

  Those in specific service professions -- wholesale or retail trade, education and professional or business services -- report greater than average levels of influence.

- Respondents' knowledgeability of mini-computers (44%) falls in the middle range relative to the other ten types of office products and systems investigated. Although claimed knowledgeability rises rapidly among the more influential purchase decision-makers (61%), only a minority of them -- 15% -- indicate that they feel "very" knowledgeable about mini-computers. This clearly points to an important gap in purchase decision-makers' understanding of mini-computers.

	Total	Opinion Is Very/Fairly Important In Purchase Decision
Knowledgeability of Mini-Computers		
Very knowledgeable	10%	15%
Fairly knowledgeable	34	46
Very/fairly knowledgeable	44%	61%

- About one-third of respondents are involved in the purchase decision-making process at the initiation phase, while about one-quarter are involved in other phases:

Initiation	31%
Specification	22
Evaluation	25
Recommendation	23
Authorization	22

Top management plays the biggest role in the initiation stage (46%) and the authorization stage (45%).

Factors Important in the Decision to Buy Mini-Computers

- The vast majority of respondents (88%) report that their companies, large or small, would be receptive to having mini-computers.

- The most important factors -- reported by one-quarter or more of respondents -- in the decision to buy mini-computers are:

Manufacturer's reputation	30%
Reliability	30
Service	27
Price	25
Ease of use	25

These attributes are important regardless of company size. Brand reputation and reliable, dependable service are critical characteristics to communicate to prospective companies about mini-computers.

- The least important factors -- considered by 10% or less of respondents -- are:

Noise level	10%
Current product/system is obsolete	7
American-made	6
Appearance	6
Brand loyalty	5
Always replace after a certain period of time	2

Appearance and place of origin are not crucial to prospective companies when they are considering mini-computers. And, most importantly, neither is brand loyalty.

Sources

- Respondents indicate that if their companies were in the market for mini-computers, they would most prefer buying directly from the vendor (29%), second most prefer buying from the manufacturer's representative (18%), and least prefer buying from independent dealers (6%), distributors (5%), and value-added resellers (4%). Smaller sized companies, on the other hand, are just as likely to buy from the manufacturer's representative (19%) as they are to buy from the vendor directly (18%).

Directly from vendor	29%
Manufacturer's representative	18
Independent dealer	6
Distributor	5
Value-added reseller	4
Retail store	4

CONCLUSION

Respondents are involved in their companies' purchase decisions for mini-computers. This is especially true for top management and those in smaller sized companies. Manufacturers may need to increase prospective buyers' knowledge about mini-computers in order to raise awareness levels of low incidence brands and to strengthen brand loyalty.

WHETHER COMPANY CURRENTLY USES
MINI-COMPUTERS

	Total (469)	Company Size: < 100 (187)	100 + (269)
Currently used	55%	34%	70%
Not currently used	32	55	17
No idea at all	7	1	9
No answer	7	10	3

WHETHER PURCHASED MINI-COMPUTERS
IN THE PAST TWO YEARS

	Have This Office Product/System:		
		Company Size:	
	Total (255)	< 100 (63)	100 + (189)
Yes, purchased	64%	64%	64%
No, not purchased	18	29	14
No idea at all	15	2	19
No answer	4	5	3

BRAND NAMES OF MINI-COMPUTERS
CURRENTLY USED IN COMPANY

	Have This Office Product/System (255)
IBM	43%
DIGITAL EQUIPMENT CORPORATION (DEC)	17
HEWLETT-PACKARD	12
WANG	11
DATA GENERAL	5
BURROUGHS	4
NCR	4
INTERGRAPH	3
PRIME COMPUTER	2
MODCOMP	--
CONTROL DATA CORPORATION (CDC)	--
GOULD	--
Other	8
No idea at all	11
No answer	9

OTHER OFFICE PRODUCTS/SYSTEMS USED
BY COMPANIES THAT CURRENTLY HAVE MINI-COMPUTERS

	Have Mini-Computers (255)
Office copiers	95%
Personal computers	88
Personal computer software	86
Dot matrix printers	77
Telecommunication systems and equipment	73
Local area networks	63
Dictating equipment	62
Laser printers	61
Mainframe computers	60
Desktop publishing systems	43

IMPORTANCE OF RESPONDENT'S OPINION IN COMPANY DECISION TO PURCHASE MINI-COMPUTERS

	Total (469)	Company Size: < 100 (187)	Company Size: 100 + (269)	Top Management (214)
Very important	28%	49%	14%	48%
Fairly important	18	19	17	16
Not too important	20	12	25	15
Not at all important	23	7	36	11
No idea at all	6	6	5	4
No answer	6	8	3	6

DEMOGRAPHIC PROFILE OF PURCHASE DECISION-MAKERS
FOR MINI-COMPUTERS

	Opinion Is Very/Fairly Important In Purchase Decision	
Total	46%	
Under 100 employees	67	
100 or more employees	31	
Principal Activity of Company		
Industrial		
Manufacturing, processing, publishing	41	
Transportation, communications, utilities	44	
Mining, oil or gas extraction	37*	
Construction	46	
Service		
Banking, finance, insurance, real estate	42	
Wholesale or retail trade	53	
Education	58	
Professional or business services	53	
Government	19*	
Job Title or Position		
Top Management	64	
Chairman of the board, president, CEO		79
Vice president		49
MIS director		59*
Chief information officer		73*
Other company officer or general manager		46
Owner, partner		71
Other management	31	
Professional	43	
Salesperson, broker, agent, representative	14	
Trainee, office worker, production worker	23*	
Skilled craftsman, laborer	21*	

*Based on less than 20 respondents.

KNOWLEDGE ABOUT MINI-COMPUTERS

	Total (469)	Opinion Is Very/Fairly Important In Purchase Decision (213)	Top Management (214)
Very knowledgeable	10%	15%	11%
Fairly knowledgeable	34	46	33
Not too knowledgeable	33	25	37
Not at all knowledgeable	18	14	16
No answer	4	1	3

RESPONDENT INVOLVEMENT IN DECISION TO PURCHASE
MINI-COMPUTERS

	Total (469)	Opinion Is Very/Fairly Important In Purchase Decision (213)	Company Size: < 100 (187)	Company Size: 100 + (269)	Top Management (214)
Initiation	31%	55%	49%	21%	46%
Specification	22	38	33	15	31
Evaluation	25	46	40	15	38
Recommendation	23	43	36	15	34
Authorization	22	43	41	10	45
Not at all involved	39	10	16	55	21
No answer	10	6	11	6	8

WHETHER COMPANY WOULD PURCHASE
MINI-COMPUTERS

	Total (469)	Opinion Is Very/Fairly Important In Purchase Decision (213)	Company Size: ≤ 100 (187)	Company Size: 100 + (269)
Company would purchase	88%	85%	76%	96%
Company would never purchase	12	15	24	4

IMPORTANCE OF VARIOUS FACTORS IN DECISION TO PURCHASE
NEW MINI-COMPUTERS

	Total (469)	Opinion Is Very/Fairly Important In Purchase Decision (213)	Company Size: < 100 (187)	Company Size: 100 + (269)
Manufacturer's reputation	30%	50%	39%	25%
Reliability	30	52	40	24
Service	27	47	36	21
Price	25	43	33	20
Ease of use	25	42	33	20
Expandability/ability to upgrade	23	39	30	19
Performance	23	39	30	19
Durability	23	38	29	19
Quality	23	36	31	18
Memory size	22	37	29	18
Special features	20	36	26	18
Compatibility with existing systems	20	33	23	18
Cost of ownership including service and training	20	36	27	15
Speed	17	29	20	16
Support staff recommendations	17	28	21	15
Expert opinion	16	29	22	12
Networking ability	15	26	17	14
Connectivity	14	23	13	16
Noise level	10	19	14	8
Current product/system is obsolete	7	11	10	5
American-made	6	12	10	4
Appearance	6	10	6	5
Brand loyalty	5	9	7	4
Always replace after a certain period of time	2	3	2	2

SOURCE WOULD USE TO PURCHASE MINI-COMPUTERS

	Total (469)	Opinion Is Very/Fairly Important In Purchase Decision (213)	Company Size: < 100 (187)	Company Size: 100 + (269)
Directly from vendor	29%	31%	18%	39%
Manufacturer's representative	18	26	19	18
Independent dealer	6	11	11	2
Distributor	5	10	8	4
Retail store	4	7	8	1
Value-added reseller	4	7	5	4
No idea at all	22	10	10	29
No answer	16	15	20	12

PERSONAL COMPUTERS

RESULTS

Personal computers were defined to the respondent on the questionnaire as small computers designed for individual use.

Current Usage

- Personal computers were found to be one of the most widely owned office products in this investigation. Eight out of ten respondents (80%) reported that their companies had them. Personal computers are present in all size companies -- 70% of smaller sized companies (fewer than 100 employees) and 90% of larger sized companies (100 or more employees) have them.

- Nine out of ten respondents in companies with personal computers (90%) report that their companies had purchased this type of equipment in the past two years. This very high level of purchase activity demonstrates the current vitality of the personal computer field.

Brand Usage

- By far, among companies with personal computers, the leading brand is IBM (65%). Apple ranks second with a 31% usage score, and Compaq ranks third with a 20% usage score. The remaining multitude of brands are used by less than 10% of companies studied:

	Have Personal Computers
IBM	65%
APPLE	31
COMPAQ	20
TANDY (RADIO SHACK)	9
WANG	9
AT&T	8
LEADING EDGE	6
COMMODORE	5
EPSON AMERICA	5
TOSHIBA	4
ZENITH	4
NEC	3
TEXAS INSTRUMENTS	3
DATA GENERAL	2
OLIVETTI	2
DATAVUE	1
SHARP	1
SONY	1
CANON	1
PANASONIC	1
TANDON	1
QUADRAM	--

Ownership of Other Office Products and Systems

- Not surprisingly, the vast majority of companies that have personal computers also own software (94%). Other types of office products and systems are also fairly prevalent in these companies:

	Have Personal Computers
Personal computer software	94%
Office copiers	93
Dot matrix printers	80
Telecommunication systems and equipment	70
Mini-computers	60
Dictating equipment	56
Laser printers	55
Local area networks	52
Mainframe computers	49
Desktop publishing systems	38

Purchase-Decision Process

- Of all 11 office products and systems investigated, personal computers is the one in which respondents report having the most influence. About two-thirds of respondents (65%) indicate that their opinion is very or fairly important in their companies' decisions to purchase personal computers.

  Top management respondents play a central role in their companies' decisions to purchase personal computers -- a high of 81% versus 65% for the total sample.

  Those in smaller sized companies are more influential in the purchase decision than those in larger sized companies -- 84% versus 53%.

  The opinions of respondents in wholesale or retail trade or in education also have above-average influence in the purchase decision of personal computers.

- After office copiers, personal computers registered the highest level of knowledgeability among respondents for all 11 office products and systems studied. Three-fourths of respondents (75%) reported that they are very or fairly knowledgeable about personal computers. Those whose opinion counts in the purchase decision for this popular office product claim to be even more knowledgeable.

- Almost one-half of respondents (46%) are involved in the initiation stage of the purchase decision process for personal computers. And about one-third of respondents report involvement in the remaining stages of the process:

Initiation	46%
Specification	36
Evaluation	36
Recommendation	36
Authorization	30

It should be noted that involvement in brand recommendation for personal computers is one of the highest levels found for all 11 types of office products and systems studied. This finding reinforces manufacturers' need to maintain high awareness levels for their brands.

It should be further noted that top management reports playing as big a role in the authorization stage (56%) as in the initiation stage (56%) of their companies' decisions to purchase personal computers.

Factors Important in the Decision to Buy Personal Computers

- Almost all respondents (97%) report that their companies would be receptive to purchasing personal computers.

- The two most important factors -- reported by half of all respondents (51%, respectively) -- are reputation and reliability. A quality brand image is clearly crucial to success in this product area.

- The least important factors -- reported by less than 15% of respondents -- are:

Current product/system is obsolete	13%
Appearance	12
American-made	11
Brand loyalty	11
Always replace after a certain period of time	4

Respondents do not consider design and where personal computers are made as important. In particular, loyalty to a particular brand of personal computers is weak.

Sources

- When given the choice, about three out of ten respondents report that they would most prefer buying personal computers directly from the vendor. About two out of ten respondents indicate that they would prefer buying from independent dealers, manufacturers' representatives, distributors, and retail stores. The least preferred source is the value-added reseller:

	Total	Company Size < 100	Company Size 100 +
Directly from vendor	27%	17%	35%
Independent dealer	19	22	18
Manufacturer's representative	18	19	18
Distributor	17	20	16
Retail store	15	16	15
Value-added reseller	9	10	10

As seen above, smaller sized companies exhibit a different preference pattern for purchasing personal computers. Smaller companies are somewhat more partial to buying personal computers from independent dealers (22%) and distributors (20%) than they are to buying from the vendor (17%).

CONCLUSION

Personal computers are widely prevalent in business today. Respondents' influence on company purchasing in this office product field is substantial and is even more potent among top management. Due to the high levels of knowledgeability claimed here, manufacturers may need to make even greater strides at capturing the attention of prospective buyers and at distinguishing their brand image from the many others.

WHETHER COMPANY CURRENTLY USES
PERSONAL COMPUTERS

	Total	Company Size:	
		< 100	100 +
	(469)	(187)	(269)
Currently used	80%	70%	90%
Not currently used	12	24	5
No idea at all	3	1	3
No answer	5	5	3

WHETHER PURCHASED PERSONAL COMPUTERS
IN THE PAST TWO YEARS

	Have This Office Product/System:		
		Company Size:	
	Total (375)	< 100 (131)	100 + (241)
Yes, purchased	90%	91%	90%
No, not purchased	4	7	2
No idea at all	4	1	6
No answer	2	2	2

BRAND NAMES OF PERSONAL COMPUTERS
CURRENTLY USED IN COMPANY

	Have This Office Product/System (375)
IBM	65%
APPLE	31
COMPAQ	20
TANDY (RADIO SHACK)	9
WANG	9
AT&T	8
LEADING EDGE	6
COMMODORE	5
EPSON AMERICA	5
TOSHIBA	4
ZENITH	4
NEC	3
TEXAS INSTRUMENTS	3
DATA GENERAL	2
OLIVETTI	2
DATAVUE	1
SHARP	1
SONY	1
CANON	1
PANASONIC	1
TANDON	1
QUADRAM	--
Other	10
No idea at all	4
No answer	2

OTHER PRODUCTS/SYSTEMS USED
BY COMPANIES THAT CURRENTLY HAVE PERSONAL COMPUTERS

	Have Personal Computers (375)
Personal computer software	94%
Office copiers	93
Dot matrix printers	80
Telecommunication systems and equipment	70
Mini-computers	60
Dictating equipment	56
Laser printers	55
Local area networks	52
Mainframe computers	49
Desktop publishing systems	38

IMPORTANCE OF RESPONDENT'S OPINION IN COMPANY DECISION
TO PURCHASE PERSONAL COMPUTERS

	Total (469)	Company Size: < 100 (187)	Company Size: 100 + (269)	Top Management (214)
Very important	37%	57%	24%	55%
Fairly important	28	27	29	26
Not too important	16	8	23	10
Not at all important	12	2	19	3
No idea at all	4	2	5	1
No answer	4	4	2	4

DEMOGRAPHIC PROFILE OF PURCHASE DECISION-MAKERS
FOR PERSONAL COMPUTERS

	Opinion Is Very/Fairly Important In Purchase Decision
Total	**65%**
Under 100 employees	84
100 or more employees	53
Principal Activity of Company	
Industrial	
Manufacturing, processing, publishing	66
Transportation, communications, utilities	53
Mining, oil or gas extraction	73*
Construction	58
Service	
Banking, finance, insurance, real estate	62
Wholesale or retail trade	73
Education	70
Professional or business services	67
Government	69*
Job Title or Position	
Top Management	81
Chairman of the board, president, CEO	85
Vice president	76
MIS director	59*
Chief information officer	100*
Other company officer or general manager	80
Owner, partner	85
Other management	59
Professional	59
Salesperson, broker, agent, representative	35
Trainee, office worker, production worker	40*
Skilled craftsman, laborer	25*

*Based on less than 20 respondents.

KNOWLEDGE ABOUT PERSONAL COMPUTERS

	Total (469)	Opinion Is Very/Fairly Important In Purchase Decision (301)	Top Management (214)
Very knowledgeable	28%	35%	26%
Fairly knowledgeable	47	47	47
Not too knowledgeable	16	14	20
Not at all knowledgeable	5	3	5
No answer	3	2	3

RESPONDENT INVOLVEMENT IN DECISION TO PURCHASE
PERSONAL COMPUTERS

	Total (469)	Opinion Is Very/Fairly Important In Purchase Decision (301)	Company Size: < 100 (187)	Company Size: 100 + (269)	Top Management (214)
Initiation	46%	60%	56%	40%	56%
Specification	36	48	42	34	44
Evaluation	36	48	45	31	43
Recommendation	36	50	46	31	44
Authorization	30	44	45	21	56
Not at all involved	21	4	8	29	9
No answer	7	4	9	3	7

WHETHER COMPANY WOULD PURCHASE
PERSONAL COMPUTERS

	Total (469)	Opinion Is Very/Fairly Important In Purchase Decision (301)	Company Size: ≤ 100 (187)	Company Size: 100 + (269)
Company would purchase	97%	97%	96%	98%
Company would never purchase	3	3	4	2

IMPORTANCE OF VARIOUS FACTORS IN DECISION TO PURCHASE
NEW PERSONAL COMPUTERS

	Total (469)	Opinion Is Very/Fairly Important In Purchase Decision (301)	Company Size: < 100 (187)	Company Size: 100 + (269)
Manufacturer's reputation	51%	67%	58%	49%
Reliability	51	66	56	50
Service	46	60	53	44
Price	46	60	53	43
Ease of use	44	57	51	41
Expandability/ability to upgrade	42	55	46	41
Performance	41	54	45	39
Durability	40	54	47	37
Quality	40	53	45	39
Compatibility with existing systems	40	52	42	41
Memory size	39	51	45	37
Special features	37	48	41	36
Cost of ownership including service and training	31	40	37	28
Speed	31	42	34	30
Support staff recommendations	28	37	29	28
Networking ability	26	35	30	25
Connectivity	23	30	21	24
Expert opinion	21	30	26	19
Noise level	18	24	23	16
Current product/system is obsolete	13	16	16	11
Appearance	12	16	15	10
American-made	11	15	15	9
Brand loyalty	11	16	11	12
Always replace after a certain period of time	4	6	5	3

SOURCE WOULD USE TO PURCHASE PERSONAL COMPUTERS

	Total (469)	Opinion Is Very/Fairly Important In Purchase Decision (301)	Company Size: < 100 (187)	Company Size: 100 + (269)
Directly from vendor	27%	29%	17%	35%
Independent dealer	19	25	22	18
Manufacturer's representative	18	21	19	18
Distributor	17	22	20	16
Retail store	15	18	16	15
Value-added reseller	9	13	10	10
No idea at all	15	7	9	18
No answer	15	14	18	11

PERSONAL COMPUTER SOFTWARE

RESULTS

Personal computer software was defined to the respondent on the questionnaire as programs for personal computers.

Current Usage

- Personal computer software is one of the most widely owned office products investigated. Three-quarters of respondents (76%) report that their companies have personal computer software. This software is more prevalent in larger sized companies (86%) than in smaller sized companies (67%).

- Companies have been busy purchasing personal computer software over the past two years. Nine out of ten respondents (90%) in both larger- and smaller-sized companies with software have recently bought it.

Brand Usage

- Lotus (63%) is the dominant brand of personal computer software among companies that have it. Falling behind and running neck and neck are IBM and Microsoft (50% and 49%, respectively). In fourth and fifth positions rank Ashton-Tate (25%) and Word Perfect (24%). The remaining brands, of which there are many, are used by 10% or less of the companies studied:

	Have PC Software
LOTUS	63%
IBM	50
MICROSOFT	49
ASHTON-TATE	25
WORD PERFECT	24
WANG	10
BORLAND	9
MICROPRO	9
COMPUSERV	8
MICRORIM	3
APPLIED DATA RESEARCH	2
COMPUTER ASSOCIATES	2
PAPERBACK PUBLISHING	2
ANALYTICA	1
PILOT EXECUTIVE SOFTWARE	1
DAYBREAK	--

Needless to say, the competition in this field is red-hot.

Ownership of Other Office Products and Systems

- Not surprisingly, virtually all companies that have personal computer software also have personal computers (99%). One-half or more of these companies also use the majority of other office products and systems studied:

	Have PC Software
Personal computers	99%
Office copiers	94
Dot matrix printers	82
Telecommunication systems and equipment	72
Mini-computers	62
Dictating equipment	57
Laser printers	56
Local area networks	54
Mainframe computers	50
Desktop publishing systems	40

Purchase Decision Process

- A sizeable two-thirds of respondents (64%) indicate that their opinion is very or fairly important in their company's decision to purchase personal computer software.

  Top management respondents are heavily involved in their companies' decisions to purchase personal computer software (78% versus 64% for the total sample of respondents).

  Respondents in smaller sized companies are more influential than those in larger sized companies in this product field -- 82% versus 52%.

- In comparison to other office products and systems studied, respondents are above-average in their knowledge about personal computer software (66%). Influential purchase decision-makers of personal computer software contend that they are even more informed in this product area (76%).

- More than four out of ten respondents (44%) are involved in the initial stage of the purchase decision for software, and about one-third claim involvement in the other subsequent stages:

Initiation	44%
Specification	35
Evaluation	35
Recommendation	37
Authorization	31

Top management is as heavily involved in the authorization stage as they are in the initiation stage (53%, respectively).

Factors Important in the Decision to Buy Personal Computer Software

- The vast majority of respondents (97%) report that their companies would be receptive to purchasing personal computer software.

- The most important factor influencing the decision to purchase personal computer software is being easy to use (45%). One-third or more of respondents indicate that the following other features are important:

Ease of use	45%
Special features	36
Reliability	33
Price	33
Manufacturer's reputation	33
Performance	33

Clearly, user-friendliness is more important in this product field than either price or brand image.

- The least important factors -- reported by less than 10% of respondents -- are:

Connectivity	9%
Noise level	8
American-made	7
Brand loyalty	6
Appearance	4
Always replace after a certain period of time	3

Loyalty to a particular brand does not have much influence on brand selection in the software market.

Sources

- When given the choice, one-quarter of respondents (25%) indicate that they would most prefer to buy personal computer software directly from the vendor. They would least prefer to buy from a value-added reseller (8%). Smaller sized companies, in contrast, prefer buying personal computer software from retail stores (25%) and independent dealers (23%) and less so directly from the vendor (18%), manufacturer's representative (17%) and distributor (17%):

	Total	Company Size < 100	Company Size 100 +
Directly from vendor	25%	18%	32%
Retail store	22	25	20
Independent dealer	21	23	21
Distributor	20	17	24
Manufacturer's representative	17	17	17
Value-added reseller	8	7	9

CONCLUSION

Respondents' companies are heavily utilizing personal computer software. They play a very active role in its acquisition -- particularly, top management respondents. Due to the low level of brand loyalty seen, manufacturers may need to position their products in accordance with what is considered by most the critical factor influencing brand selection -- namely, being easy to use.

WHETHER COMPANY CURRENTLY USES
PERSONAL COMPUTER SOFTWARE

	Total (469)	Company Size: < 100 (187)	100 + (269)
Currently used	76%	67%	86%
Not currently used	14	26	7
No idea at all	4	1	5
No answer	6	7	3

WHETHER PURCHASED PERSONAL COMPUTER SOFTWARE
IN THE PAST TWO YEARS

	Have This Office Product/System:		
		Company Size:	
	Total	< 100	100 +
	(357)	(125)	(230)
Yes, purchased	90%	90%	91%
No, not purchased	3	5	1
No idea at all	4	2	5
No answer	4	4	3

BRAND NAMES OF PERSONAL COMPUTER SOFTWARE
CURRENTLY USED IN COMPANY

	Have This Office Product/System (357)
LOTUS	63%
IBM	50
MICROSOFT	49
ASHTON-TATE	25
WORD PERFECT	24
WANG	10
BORLAND	9
MICROPRO	9
COMPUSERV	8
MICRORIM	3
APPLIED DATA RESEARCH	2
COMPUTER ASSOCIATES	2
PAPERBACK PUBLISHING	2
ANALYTICA	1
PILOT EXECUTIVE SOFTWARE	1
DAYBREAK	--
Other	11
No idea at all	7
No answer	3

OTHER OFFICE PRODUCTS/SYSTEMS USED
BY COMPANIES THAT CURRENTLY HAVE PERSONAL COMPUTER SOFTWARE

	Have PC Software (357)
Personal computers	99%
Office copiers	94
Dot matrix printers	82
Telecommunication systems and equipment	72
Mini-computers	62
Dictating equipment	57
Laser printers	56
Local area networks	54
Mainframe computers	50
Desktop publishing systems	40

IMPORTANCE OF RESPONDENT'S OPINION IN COMPANY DECISION
TO PURCHASE PERSONAL COMPUTER SOFTWARE

	Total (469)	Company Size: < 100 (187)	Company Size: 100 + (269)	Top Management (214)
Very important	37%	57%	24%	55%
Fairly important	27	25	28	23
Not too important	18	10	23	13
Not at all important	12	3	18	4
No idea at all	4	2	4	1
No answer	4	4	2	4

DEMOGRAPHIC PROFILE OF PURCHASE DECISION-MAKERS FOR PERSONAL COMPUTER SOFTWARE

	Opinion Is Very/Fairly Important In Purchase Decision
Total	**64%**
Under 100 employees	82
100 or more employees	52
Principal Activity of Company	
Industrial	
Manufacturing, processing, publishing	66
Transportation, communications, utilities	56
Mining, oil or gas extraction	73*
Construction	55
Service	
Banking, finance, insurance, real estate	59
Wholesale or retail trade	68
Education	66
Professional or business services	66
Government	89*
Job Title or Position	
Top Management	78
Chairman of the board, president, CEO	79
Vice president	72
MIS director	75*
Chief information officer	73*
Other company officer or general manager	76
Owner, partner	81
Other management	61
Professional	62
Salesperson, broker, agent, representative	41
Trainee, office worker, production worker	29*
Skilled craftsman, laborer	25*

*Based on less than 20 respondents.

KNOWLEDGE ABOUT PERSONAL COMPUTER SOFTWARE

	Total (469)	Opinion Is Very/Fairly Important In Purchase Decision (296)	Top Management (214)
Very knowledgeable	24%	30%	24%
Fairly knowledgeable	42	46	40
Not too knowledgeable	22	19	26
Not at all knowledgeable	8	3	7
No answer	4	2	3

RESPONDENT INVOLVEMENT IN DECISION TO PURCHASE
PERSONAL COMPUTER SOFTWARE

	Total (469)	Opinion Is Very/Fairly Important In Purchase Decision (296)	Company Size: ≤ 100 (187)	Company Size: 100 + (269)	Top Management (214)
Initiation	44%	59%	53%	40%	53%
Specification	35	48	40	34	41
Evaluation	35	48	47	29	40
Recommendation	37	50	45	33	42
Authorization	31	44	45	22	53
Not at all involved	21	4	9	28	11
No answer	9	6	11	4	8

WHETHER COMPANY WOULD PURCHASE
PERSONAL COMPUTER SOFTWARE

	Total (469)	Opinion Is Very/Fairly Important In Purchase Decision (296)	Company Size: < 100 (187)	Company Size: 100 + (269)
Company would purchase	97%	97%	96%	98%
Company would never purchase	3	3	4	2

IMPORTANCE OF VARIOUS FACTORS IN DECISION TO PURCHASE
NEW PERSONAL COMPUTER SOFTWARE

	Total (469)	Opinion Is Very/Fairly Important In Purchase Decision (296)	Company Size: < 100 (187)	Company Size: 100 + (269)
Ease of use	45%	57%	46%	46%
Special features	36	47	39	36
Reliability	33	44	36	33
Price	33	46	37	32
Manufacturer's reputation	33	44	38	31
Performance	33	44	36	32
Compatibility with existing systems	30	39	30	32
Quality	29	38	31	28
Support staff recommendations	25	33	25	26
Speed	23	31	20	25
Service	22	31	26	21
Expert opinion	22	31	26	20
Durability	21	28	27	18
Expandability/ability to upgrade	20	26	20	20
Memory size	15	19	16	15
Cost of ownership including service and training	15	22	22	11
Networking ability	13	17	14	12
Current product/system is obsolete	10	14	11	10
Connectivity	9	13	10	9
Noise level	8	10	9	7
American-made	7	9	9	5
Brand loyalty	6	8	6	6
Appearance	4	6	5	4
Always replace after a certain period of time	3	5	3	4

SOURCE WOULD USE TO PURCHASE PERSONAL COMPUTER SOFTWARE

	Total (469)	Opinion Is Very/Fairly Important In Purchase Decision (296)	Company Size: ≤ 100 (187)	Company Size: 100 + (269)
Directly from vendor	25%	30%	18%	32%
Retail store	22	26	25	20
Independent dealer	21	27	23	21
Distributor	20	24	17	24
Manufacturer's representative	17	19	17	17
Value-added reseller	8	9	7	9
No idea at all	16	8	9	20
No answer	15	12	19	10

LASER PRINTERS

RESULTS

Laser printers were defined to the respondent on the questionnaire as printers which produce typeset quality characters.

Current Usage

- Laser printers are one of the less widely owned office products and systems studied. Less than one-half of respondents (45%) report that their companies have them.

- Not surprisingly, larger sized companies (100 or more employees) are considerably more likely to have laser printers than smaller sized companies (less than 100 employees) -- 60% versus 26%.

- A majority of respondents (79%) in companies that have laser printers indicate that their companies bought them in the past two years. This finding is even higher among larger sized companies than smaller sized companies (82% versus 72%). Since laser printers are a relatively new commodity in the office equipment market, this flurry of activity indicates that there is expanding need for this product in companies today.

Brand Usage

- In companies that have laser printers, the dominant brand is Hewlett-Packard (27%). Not too far behind is IBM (22%) and farther behind is Apple (16%). Other brands are used by less than 9% of companies:

	Have Laser Printers
HEWLETT-PACKARD	27%
IBM	22
APPLE	16
DIGITAL EQUIPMENT CORPORATION (DEC)	8
EPSON AMERICA	7
OKIDATA	6
WANG	4
CANON	4
XEROX	3
QMS	3
CORDATA	1
DATA GENERAL	1
NEC	1
KYOCETA	--

Ownership of Other Office Products and Systems

- Companies that have laser printers are very likely to be users of other types of office products and systems. Their reported usage levels of other types of office equipment are quite high:

	Have Laser Printers
Office copiers	98%
Personal computers	96
Personal computer software	94
Telecommunication systems and equipment	80
Dot matrix printers	80
Mini-computers	73
Dictating equipment	65
Local area networks	63
Mainframe computers	63
Desktop publishing systems	51

Purchase-Decision Process

- One-half of respondents (50%) indicate that their opinions are important in their company's decision to buy laser printers.

  Top management is considerably more influential in their companies' decisions to purchase laser printers compared to those in the total sample surveyed (69% versus 50%).

  Respondents in smaller sized companies are more influential in the purchase decision than those in larger sized companies -- 73% versus 35%.

  Those in the education field have above-average influence in the purchase decision.

- Respondents' knowledgeability about laser printers is not as great as it is for some of the other office products and systems studied. Approximately one-third (36%) of respondents reported that they are very or fairly knowledgeable. Only 10% are very knowledgeable, while 26% are fairly knowledgeable about this new type of printer. This level of knowledgeability climbs to 45% among those whose opinion is more important in the company purchase decision.

- Three out of ten respondents (30%) report involvement at the initial stage of the decision-making process to buy laser printers. About one-quarter of respondents report involvement at the other four stages:

Initiation	30%
Specification	23
Evaluation	26
Recommendation	26
Authorization	24

Those in smaller sized companies play a bigger role in each stage of the decision-making process than those in larger sized companies. This is undoubtedly because job responsibilities in larger sized companies are more specialized than they are in smaller sized companies.

Top management plays a slightly bigger role in the authorization stage of the process than in the initiation stage of the process (47% versus 43%) to buy laser printers.

Factors Important in the Decision to Buy Laser Printers

- The vast majority of companies (92%) are receptive to buying laser printers.

- The most important factors -- reported by 25% or more of respondents -- in the decision to buy laser printers are:

Reliability	30%
Manufacturer's reputation	28
Durability	26
Service	25

Clearly, brand image and dependability are critical in the purchase of laser printers.

- The least important factors -- considered by 10% or less of respondents -- are:

Networking ability	10%
Memory size	9
Appearance	6
Current product/system is obsolete	6
American-made	6
Brand loyalty	4
Always replace after a certain period of time	3

The look of laser printers, where they are made and their brand name are all of low priority to prospective buyers.

Sources

- Respondents report that if their companies were to buy laser printers, the most preferred source would be direct from the vendor (21%). The next most preferred source would be the manufacturer's representative (16%), followed by independent dealers (13%), distributors (12%), retail stores (11%) and least of all, value-added resellers (8%). Smaller sized companies, on the other hand, are just as likely to prefer buying from the manufacturer's representative as from the vendor (17% versus 16%):

	Total	Company Size	
		< 100	100 +
Directly from vendor	21%	16%	27%
Manufacturer's representative	16	17	16
Independent dealer	13	14	12
Distributor	12	12	12
Retail store	11	15	9
Value-added reseller	8	8	8

CONCLUSION

The survey results indicate that companies are currently in the market for laser printers. In addition, companies that now own laser printers are good prospects for other types of office products and systems. Since brand loyalty is not important in the purchase decision and respondents' knowledgeability about laser printers is markedly low, brand image may be critical in the brand choice made for laser printers. Top management are major players in their companies' decisions to purchase laser printers.

WHETHER COMPANY CURRENTLY USES
LASER PRINTERS

	Total (469)	Company Size: < 100 (187)	100 + (269)
Currently used	45%	26%	60%
Not currently used	41	61	28
No idea at all	6	2	7
No answer	8	11	5

WHETHER PURCHASED LASER PRINTERS
IN THE PAST TWO YEARS

	Have This Office Product/Service:		
		Company Size:	
	Total	< 100	100 +
	(213)	(49)	(162)
Yes, purchased	79%	72%	82%
No, not purchased	8	24	4
No idea at all	10	2	12
No answer	3	3	2

BRAND NAMES OF LASER PRINTERS
CURRENTLY USED IN COMPANY

	Have This Office Product/System (213)
HEWLETT-PACKARD	27%
IBM	22
APPLE	16
DIGITAL EQUIPMENT CORPORATION (DEC)	8
EPSON AMERICA	7
OKIDATA	6
WANG	4
CANON	4
XEROX	3
QMS	3
CORDATA	1
DATA GENERAL	1
NEC	1
KYOCETA	--
Other	5
No idea at all	19
No answer	5

OTHER OFFICE PRODUCTS/SYSTEMS USED
BY COMPANIES THAT CURRENTLY HAVE LASER PRINTERS

	Have Laser Printers (213)
Office copiers	98%
Personal computers	96
Personal computer software	94
Telecommunication systems and equipment	80
Dot matrix printers	80
Mini-computers	73
Dictating equipment	65
Local area networks	63
Mainframe computers	63
Desktop publishing systems	51

IMPORTANCE OF RESPONDENT'S OPINION IN COMPANY DECISION TO PURCHASE LASER PRINTERS

	Total (469)	Company Size: < 100 (187)	Company Size: 100 + (269)	Top Management (214)
Very important	30%	54%	14%	51%
Fairly important	20	19	21	18
Not too important	22	15	28	17
Not at all important	18	3	28	7
No idea at all	5	4	6	3
No answer	5	5	4	4

DEMOGRAPHIC PROFILE OF PURCHASE DECISION-MAKERS FOR LASER PRINTERS

	Opinion Is Very/Fairly Important In Purchase Decision
Total	**50%**
Under 100 employees	73
100 or more employees	35
Principal Activity of Company	
Industrial	
Manufacturing, processing, publishing	46
Transportation, communications, utilities	47
Mining, oil or gas extraction	37*
Construction	51
Service	
Banking, finance, insurance, real estate	49
Wholesale or retail trade	53
Education	62
Professional or business services	53
Government	39*
Job Title or Position	
Top Management	**69**
Chairman of the board, president, CEO	78
Vice president	55
MIS director	59*
Chief information officer	73*
Other company officer or general manager	57
Owner, partner	76
Other management	37
Professional	43
Salesperson, broker, agent, representative	30
Trainee, office worker, production worker	29*
Skilled craftsman, laborer	--*

*Based on less than 20 respondents.

KNOWLEDGE ABOUT LASER PRINTERS

	Total (469)	Opinion Is Very/Fairly Important In Purchase Decision (232)	Top Management (214)
Very knowledgeable	10%	15%	11%
Fairly knowledgeable	26	30	24
Not too knowledgeable	35	32	33
Not at all knowledgeable	24	21	28
No answer	5	3	4

RESPONDENT INVOLVEMENT IN DECISION TO PURCHASE
LASER PRINTERS

	Total (469)	Opinion Is Very/Fairly Important In Purchase Decision (232)	Company Size: < 100 (187)	Company Size: 100 + (269)	Top Management (214)
Initiation	30%	49%	44%	22%	43%
Specification	23	39	35	16	32
Evaluation	26	41	40	17	34
Recommendation	26	41	39	18	33
Authorization	24	41	40	14	47
Not at all involved	34	13	16	48	20
No answer	10	6	11	6	9

WHETHER COMPANY WOULD PURCHASE
LASER PRINTERS

	Total (469)	Opinion Is Very/Fairly Important In Purchase Decision (232)	Company Size: < 100 (187)	Company Size: 100 + (269)
Company would purchase	92%	90%	85%	96%
Company would never purchase	8	10	15	4

IMPORTANCE OF VARIOUS FACTORS IN DECISION TO PURCHASE
NEW LASER PRINTERS

	Total (469)	Opinion Is Very/Fairly Important In Purchase Decision (232)	Company Size: < 100 (187)	Company Size: 100 + (269)
Reliability	30%	46%	32%	27%
Manufacturer's reputation	28	42	36	24
Durability	26	40	33	22
Service	25	39	32	22
Price	23	34	32	18
Quality	23	34	27	21
Ease of use	22	34	28	18
Special features	21	34	27	19
Compatibility with existing systems	21	32	25	19
Performance	21	32	29	17
Speed	18	29	24	14
Noise level	17	25	20	16
Cost of ownership including service and training	15	23	23	10
Support staff recommendations	14	21	17	13
Expert opinion	14	21	16	12
Connectivity	12	18	14	11
Expandability/ability to upgrade	11	17	15	9
Networking ability	10	16	11	10
Memory size	9	13	12	8
Appearance	6	10	8	5
Current product/system is obsolete	6	10	8	5
American-made	6	9	8	4
Brand loyalty	4	8	4	4
Always replace after a certain period of time	3	4	3	2

SOURCE WOULD USE TO PURCHASE LASER PRINTERS

	Total (469)	Opinion Is Very/Fairly Important In Purchase Decision (232)	Company Size: ≤ 100 (187)	Company Size: 100 + (269)
Directly from vendor	21%	24%	16%	27%
Manufacturer's representative	16	20	17	16
Independent dealer	13	18	14	12
Distributor	12	18	12	12
Retail store	11	16	15	9
Value-added reseller	8	11	8	8
No idea at all	24	13	12	31
No answer	19	17	24	13

DOT MATRIX PRINTERS

RESULTS

Dot matrix printers were defined to the respondent on the questionnaire as printers which produce characters formed of dots which do not have the high quality appearance produced by a typewriter or letter-quality printer.

Current Usage

- Dot matrix printers are fairly widely owned. About seven out of ten respondents (69%) report that their companies have these printers. Dot matrix printers are more prevalent in businesses today than are their newer and higher quality print counterparts -- laser printers (owned by 45% of companies).

  (It should be noted that a discrepancy exists between the 69% reported incidence of company ownership of dot matrix printers among those who mailed back the questionnaire and the 56% reported incidence estimated for the wider study sample. See the Method Section for more detail.)

- Dot matrix printers are more likely to be found in larger sized companies (100 or more employees) than in smaller sized companies (less than 100 employees) -- 77% versus 62%.

- Almost eight out of ten respondents (79%) in companies that have dot matrix printers indicated that their companies purchased these printers in the past two years. Both larger sized companies and smaller sized companies have been recently active in acquiring these printers.

Brand Usage

- In companies that have dot matrix printers, two brands are essentially tied for first place -- Epson America (32%) and IBM (29%). Okidata ranks in third place with a 22% level of ownership, and Apple trails behind in fourth place with a 13% level of ownership. Other brands, of which there are many, are used by less than 8% of companies:

	Have Dot Matrix Printers
EPSON AMERICA	32%
IBM	29
OKIDATA	22
APPLE	13
NEC	7
DIGITAL EQUIPMENT CORPORATION (DEC)	6
HEWLETT-PACKARD	6
C. ITOH	5
TANDY (RADIO SHACK)	5
TOSHIBA	4
PANASONIC	3
WANG	3
DATA GENERAL	1
CANON	1
SHARP	1
RICOH	1
SONY	1
KYOCETA	--

With so many brands in the marketplace and neck-and-neck competition at the top, brand familiarity appears to be quite important.

Ownership of Other Office Products and Systems

- Companies that have dot matrix printers are also well equipped with other types of office products and systems -- particularly, personal computers (92%) and personal computer software (90%). About one-half of companies (52%) that own dot matrix printers also own laser printers.

	Have Dot Matrix Printers
Office copiers	93%
Personal computers	92
Personal computer software	90
Telecommunication systems and equipment	70
Mini-computers	61
Local area networks	55
Dictating equipment	54
Laser printers	52
Mainframe computers	50
Desktop publishing systems	37

Decision-Making Process

- One-half of respondents (51%) indicate that their opinions are important in their companies' decisions to buy dot matrix printers.

  Top management respondents are very involved in their companies' purchase decisions for dot matrix printers -- 66% versus 51% for total respondents.

  Respondents in smaller sized companies, relative to larger sized companies, are more influential in the purchase decision -- 71% versus 38%. In addition, those in the education field have above-average influence.

- Knowledgeability about dot matrix printers is fairly high. Almost six out of ten respondents (56%) claim to be very or fairly knowledgeable about these types of printers. Influential purchase decision-makers are even more knowledgeable (73%).

- One-third of respondents (33%) are involved in the initiation stage of the purchase decision process. About one-quarter of respondents are involved in the subsequent stages -- specification, evaluation, recommendation and authorization -- of their companies' decisions to purchase dot matrix printers:

Initiation	33%
Specification	25
Evaluation	27
Recommendation	28
Authorization	25

Factors Important in the Decision to Buy Dot Matrix Printers

- The vast majority of respondents (94%) report that their companies would be receptive to buying dot matrix printers.

- The <u>most</u> important factors -- reported by more than 25% of respondents -- when considering the purchase of dot matrix printers are:

Reliability	33%
Manufacturer's reputation	31
Durability	28
Service	28
Price	27

Clearly, prospective buyers start out looking for dependability and a reputable brand name when they are looking at dot matrix printers.

- The least important factors -- considered by less than 10% of respondents -- are:

Networking ability	9%
Memory size	8
Current product/system is obsolete	8
Appearance	6
American-made	6
Brand loyalty	5
Always replace after a certain period of time	3

Appearance, brand loyalty and country of origin are all disregarded by respondents in the market for dot matrix printers.

Sources

- If they were in the market to buy, about two out of ten respondents (22%) indicate that they would most prefer to purchase dot matrix printers directly from the vendor. On average, about 15% would turn to a manufacturer's representative, an independent dealer, a distributor or a retail store. Only 7% of respondents feel that their companies would buy dot matrix printers from a value-added reseller. Smaller sized companies, on the other hand, are not as strongly tied to buying directly from the vendor and would consider a wider variety of options.

Directly from vendor	22%
Manufacturer's representative	16
Independent dealer	15
Distributor	14
Retail store	12
Value-added reseller	7

CONCLUSION

Dot matrix printers are fairly widely owned and are being bought actively. Top management respondents are very influential in their companies' decisions to purchase these printers. Respondents depend on brand reputation -- and not on loyalty to a particular brand -- to guide them in their purchase decision.

WHETHER COMPANY CURRENTLY USES
DOT MATRIX PRINTERS

	Total	Company Size: < 100	100 +
	(469)	(187)	(269)
Currently used	69%	62%	77%
Not currently used	19	30	12
No idea at all	5	--	7
No answer	6	7	3

WHETHER PURCHASED DOT MATRIX PRINTERS
IN THE PAST TWO YEARS

	Have This Office Product/System:		
		Company Size:	
	Total	< 100	100 +
	(325)	(116)	(207)
Yes, purchased	79%	81%	79%
No, not purchased	10	15	7
No idea at all	8	2	12
No answer	3	3	2

BRAND NAMES OF DOT MATRIX PRINTERS
CURRENTLY USED IN COMPANY

	Have This Office Product/System (325)
EPSON AMERICA	32%
IBM	29
OKIDATA	22
APPLE	13
NEC	7
DIGITAL EQUIPMENT CORPORATION (DEC)	6
HEWLETT-PACKARD	6
C. ITOH	5
TANDY (RADIO SHACK)	5
TOSHIBA	4
PANASONIC	3
WANG	3
DATA GENERAL	1
CANON	1
SHARP	1
RICOH	1
SONY	1
KYOCETA	--
Other	7
No idea at all	12
No answer	3

OTHER OFFICE PRODUCTS/SYSTEMS USED
BY COMPANIES THAT CURRENTLY HAVE DOT MATRIX PRINTERS

	Have Dot Matrix Printers (325)
Office copiers	93%
Personal computers	92
Personal computer software	90
Telecommunication systems and equipment	70
Mini-computers	61
Local area networks	55
Dictating equipment	54
Laser printers	52
Mainframe computers	50
Desktop publishing systems	37

IMPORTANCE OF RESPONDENT'S OPINION IN COMPANY DECISION
TO PURCHASE DOT MATRIX PRINTERS

	Total (469)	Company Size: < 100 (187)	Company Size: 100 + (269)	Top Management (214)
Very important	30%	52%	15%	48%
Fairly important	21	19	23	18
Not too important	22	16	27	17
Not at all important	17	3	27	7
No idea at all	5	3	6	3
No answer	6	6	3	6

DEMOGRAPHIC PROFILE OF PURCHASE DECISION-MAKERS
FOR DOT MATRIX PRINTERS

	Opinion Is Very/Fairly Important In Purchase Decision
Total	51%
Under 100 employees	71
100 or more employees	38
Principal Activity of Company	
Industrial	
Manufacturing, processing, publishing	49
Transportation, communications, utilities	44*
Mining, oil or gas extraction	37
Construction	51
Service	
Banking, finance, insurance, real estate	46
Wholesale or retail trade	56
Education	66
Professional or business services	55
Government	58*
Job Title or Position	
Top Management	66
Chairman of the board, president, CEO	70
Vice president	53
MIS director	59*
Chief information officer	47*
Other company officer or general manager	64
Owner, partner	75
Other management	43
Professional	49
Salesperson, broker, agent, representative	28
Trainee, office worker, production worker	29*
Skilled craftsman, laborer	7*

*Based on less than 20 respondents.

KNOWLEDGE ABOUT DOT MATRIX PRINTERS

	Total (469)	Opinion Is Very/Fairly Important In Purchase Decision (237)	Top Management (214)
Very knowledgeable	19%	28%	18%
Fairly knowledgeable	37	45	36
Not too knowledgeable	24	18	28
Not at all knowledgeable	16	7	16
No answer	4	1	2

RESPONDENT INVOLVEMENT IN DECISION TO PURCHASE
DOT MATRIX PRINTERS

	Total (469)	Opinion Is Very/Fairly Important In Purchase Decision (237)	Company Size: < 100 (187)	Company Size: 100 + (269)	Top Management (214)
Initiation	33%	54%	45%	27%	45%
Specification	25	41	32	21	31
Evaluation	27	46	40	20	34
Recommendation	28	46	38	22	32
Authorization	25	41	39	17	47
Not at all involved	32	8	16	43	18
No answer	10	6	13	5	11

WHETHER COMPANY WOULD PURCHASE
DOT MATRIX PRINTERS

	Total (469)	Opinion Is Very/Fairly Important In Purchase Decision (237)	Company Size: < 100 (187)	Company Size: 100 + (269)
Company would purchase	94%	94%	91%	96%
Company would never purchase	6	6	9	4

IMPORTANCE OF VARIOUS FACTORS IN DECISION TO PURCHASE
NEW DOT MATRIX PRINTERS

	Total (469)	Opinion Is Very/Fairly Important In Purchase Decision (237)	Company Size: < 100 (187)	Company Size: 100 + (269)
Reliability	33%	53%	40%	29%
Manufacturer's reputation	31	50	42	25
Durability	28	47	35	25
Service	28	46	38	22
Price	27	43	37	22
Special features	24	37	27	23
Quality	23	37	29	20
Performance	22	36	31	17
Ease of use	22	36	29	18
Noise level	22	33	24	21
Compatibility with existing systems	21	33	26	18
Speed	21	35	28	17
Cost of ownership including service and training	14	23	20	10
Support staff recommendations	12	20	16	10
Expert opinion	12	21	17	10
Connectivity	11	19	14	10
Expandability/ability to upgrade	11	18	15	9
Networking ability	9	15	10	8
Memory size	8	14	10	7
Current product/system is obsolete	8	13	11	6
Appearance	6	12	9	5
American-made	6	12	10	3
Brand loyalty	5	9	5	5
Always replace after a certain period of time	3	5	4	2

SOURCE WOULD USE TO PURCHASE DOT MATRIX PRINTERS

	Total (469)	Opinion Is Very/Fairly Important In Purchase Decision (237)	Company Size: < 100 (187)	Company Size: 100 + (269)
Directly from vendor	22%	27%	17%	26%
Manufacturer's representative	16	20	17	17
Independent dealer	15	23	19	14
Distributor	14	20	14	14
Retail store	12	19	16	10
Value-added reseller	7	10	7	8
No idea at all	20	9	9	27
No answer	18	14	22	14

DESKTOP PUBLISHING SYSTEMS

RESULTS

Desktop publishing systems were defined to the respondent on the questionnaire as combinations of hardware and software which enable the user to produce typeset-quality reports and presentations.

Current Usage

- One-third of respondents (33%) report that their companies have desktop publishing systems, the lowest ownership level found for all 11 office products and systems studied. This result is not surprising since desktop publishing is fairly new and has only been recently introduced.

- Larger sized companies are more likely to own desktop publishing systems than smaller sized companies (41% versus 23%).

- Two-thirds of respondents (66%) in companies with desktop publishing indicate that this equipment was purchased in the past two years. This high level of activity demonstrates the vitality of the current market.

Brand Usage

- IBM has the greatest share (26%) of the desktop publishing system market among companies that have it. Apple trails behind at 16%, and the remaining competitors each comprise less than 8%:

	Have Desktop Publishing Systems
IBM	26%
APPLE	16
XEROX	7
CANON	4
DIGITAL EQUIPMENT CORPORATION (DEC)	4
HEWLETT-PACKARD	3
NBI	1
HARRIS-LANIER	1
DATA GENERAL	1
CORDATA	--

Since this product area is relatively new, opportunities exist for manufacturers to command a greater share before the market settles down.

Ownership of Other Office Products and Systems

- Companies that have desktop publishing systems are fairly heavily equipped with the other office products and systems studied:

	Have Desktop Publishing Systems
Office copiers	97%
Personal computers	92
Personal computer software	92
Dot matrix printers	77
Telecommunication systems and equipment	74
Mini-computers	70
Laser printers	70
Local area networks	69
Dictating equipment	67
Mainframe computers	60

Purchase-Decision Process

- Close to one-half of respondents (45%) indicate that their opinions are very or fairly important in their companies' decisions to buy desktop publishing systems.

  Top management respondents are very influential in their companies' decisions to buy desktop publishing systems (64% for top management versus 45% for total respondents).

  Those in smaller sized companies play a much greater role in the purchase decision compared to those in larger sized companies (70% versus 29%).

  Respondents in the wholesale or retail trade industry and those in professional or business services have above-average impact in their companies' purchasing decisions for desktop publishing systems.

- Desktop publishing is the least understood office system studied. Less than one-quarter (23%) report that they are knowledgeable, including only 7% reporting to be very knowledgeable. Knowledgeability among influential purchase decision-makers rises to 38%.

- About three out of ten respondents (29%) are involved at the initiation stage of the decision to purchase desktop

publishing for their companies, while more than one-fifth are involved in the other stages of the process:

Initiation	29%
Specification	21
Evaluation	23
Recommendation	23
Authorization	22

Top management is as involved in the authorization stage as in the initiation stage of deciding to purchase desktop publishing systems (44% versus 44%) for their companies.

Factors Important in the Decision to Buy Desktop Publishing Systems

- The vast majority of companies (87%) report that they would be receptive to purchasing desktop publishing systems.

- The most important factors -- reported by 15% or more of respondents -- in the decision to buy desktop publishing systems are:

Manufacturer's reputation	19%
Reliability	17
Ease of use	17
Special features	17
Price	15
Quality	15
Durability	15

Reliance on a brand name is a safe bet in a field where respondents feel unknowledgeable.

- The least important factors, considered by 5% or less of respondents, are:

Current product/system is obsolete	5%
American-made	4
Appearance	4
Brand loyalty	3
Always replace after a certain period of time	3

Clearly, brand switching is a real threat in this office product field.

Sources

- If respondents' companies were currently in the market for desktop publishing systems, they would most prefer making their purchases directly from the vendor (19%). Other considered sources would be:

Directly from vendor	19%
Manufacturer's representative	10
Distributor	9
Independent dealer	8
Retail store	7
Value-added reseller	6

CONCLUSION

Desktop publishing is a fairly new entry in the office products and systems market and its recent introduction has caused considerable purchase activity. Top management respondents are very influential in their companies' decisions to buy desktop publishing systems. The decision to buy desktop publishing is currently being based on brand reputation first and brand loyalty last.

WHETHER COMPANY CURRENTLY USES
DESKTOP PUBLISHING SYSTEMS

	Total (469)	Company Size: < 100 (187)	100 + (269)
Currently used	33%	23%	41%
Not currently used	47	63	38
No idea at all	10	2	15
No answer	10	11	6

WHETHER PURCHASED DESKTOP PUBLISHING SYSTEMS
IN THE PAST TWO YEARS

	Have This Office Product/System:		
		Company Size:	
	Total (154)	< 100 (43)	100 + (109)
Yes, purchased	66%	76%	63%
No, not purchased	12	15	11
No idea at all	15	3	20
No answer	7	7	6

BRAND NAMES OF DESKTOP PUBLISHING SYSTEMS
CURRENTLY USED IN COMPANY

	Have This Office Product/System (154)
IBM	26%
APPLE	16
XEROX	7
CANON	4
DIGITAL EQUIPMENT CORPORATION (DEC)	4
HEWLETT-PACKARD	3
NBI	1
HARRIS-LANIER	1
DATA GENERAL	1
CORDATA	--
Other	7
No idea at all	26
No answer	9

OTHER OFFICE PRODUCTS/SYSTEMS USED
BY COMPANIES THAT CURRENTLY HAVE DESKTOP PUBLISHING SYSTEMS

	Have Desktop Publishing Systems (154)
Office copiers	97%
Personal computers	92
Personal computer software	92
Dot matrix printers	77
Telecommunication systems and equipment	74
Mini-computers	70
Laser printers	70
Local area networks	69
Dictating equipment	67
Mainframe computers	60

IMPORTANCE OF RESPONDENT'S OPINION IN COMPANY DECISION
TO PURCHASE DESKTOP PUBLISHING SYSTEMS

	Total (469)	Company Size: ≤ 100 (187)	Company Size: 100 + (269)	Top Management (214)
Very important	26%	51%	10%	45%
Fairly important	19	19	19	19
Not too important	20	12	26	17
Not at all important	21	6	32	7
No idea at all	8	5	9	6
No answer	6	8	3	6

DEMOGRAPHIC PROFILE OF PURCHASE DECISION-MAKERS
FOR DESKTOP PUBLISHING SYSTEMS

	Opinion Is Very/Fairly Important In Purchase Decision	
Total	45%	
Under 100 employees	70	
100 or more employees	29	
Principal Activity of Company		
Industrial		
Manufacturing, processing, publishing	42	
Transportation, communications, utilities	42	
Mining, oil or gas extraction	37*	
Construction	51	
Service		
Banking, finance, insurance, real estate	37	
Wholesale or retail trade	53	
Education	40	
Professional or business services	53	
Government	39*	
Job Title or Position		
Top Management	64	
Chairman of the board, president, CEO		70
Vice president		50
MIS director		59*
Chief information officer		100*
Other company officer or general manager		52
Owner, partner		74
Other management	35	
Professional	37	
Salesperson, broker, agent, representative	11	
Trainee, office worker, production worker	23*	
Skilled craftsman, laborer	14*	

*Based on less than 20 respondents.

KNOWLEDGE ABOUT DESKTOP PUBLISHING SYSTEMS

	Total (469)	Opinion Is Very/Fairly Important In Purchase Decision (211)	Top Management (214)
Very knowledgeable	7%	14%	10%
Fairly knowledgeable	16	24	18
Not too knowledgeable	41	41	40
Not at all knowledgeable	28	18	27
No answer	7	4	5

RESPONDENT INVOLVEMENT IN DECISION TO PURCHASE
DESKTOP PUBLISHING SYSTEMS

	Total (469)	Opinion Is Very/Fairly Important In Purchase Decision (211)	Company Size: < 100 (187)	Company Size: 100 + (269)	Top Management (214)
Initiation	29%	51%	45%	19%	44%
Specification	21	36	33	13	30
Evaluation	23	43	40	12	34
Recommendation	23	40	35	16	32
Authorization	22	40	40	10	44
Not at all involved	40	12	18	56	22
No answer	12	8	14	7	11

WHETHER COMPANY WOULD PURCHASE
DESKTOP PUBLISHING SYSTEMS

	Total (469)	Opinion Is Very/Fairly Important In Purchase Decision (211)	Company Size: < 100 (187)	Company Size: 100 + (269)
Company would purchase	87%	86%	77%	93%
Company would never purchase	13	14	23	7

IMPORTANCE OF VARIOUS FACTORS IN DECISION TO PURCHASE
NEW DESKTOP PUBLISHING SYSTEMS

	Total (469)	Opinion Is Very/Fairly Important In Purchase Decision (211)	Company Size: < 100 (187)	Company Size: 100 + (269)
Manufacturer's reputation	19%	33%	27%	14%
Reliability	17	31	21	15
Ease of use	17	31	23	13
Special features	17	30	23	13
Price	15	28	22	11
Quality	15	26	20	12
Durability	15	27	19	12
Performance	14	27	21	10
Service	14	25	19	11
Cost of ownership including service and training	11	20	16	8
Expandability/ability to upgrade	11	20	15	9
Compatibility with existing systems	11	20	15	9
Expert opinion	11	21	15	8
Support staff recommendations	10	18	13	8
Speed	9	18	13	7
Noise level	8	12	9	8
Connectivity	7	12	8	7
Memory size	7	12	10	6
Networking ability	7	13	8	6
Current product/system is obsolete	5	9	6	4
American-made	4	7	7	2
Appearance	4	7	5	3
Brand loyalty	3	5	3	3
Always replace after a certain period of time	3	5	4	2

SOURCE WOULD USE TO PURCHASE DESKTOP PUBLISHING SYSTEMS

	Total (469)	Opinion Is Very/Fairly Important In Purchase Decision (211)	Company Size: < 100 (187)	Company Size: 100 + (269)
Directly from vendor	19%	25%	15%	24%
Manufacturer's representative	10	12	10	11
Distributor	9	14	9	10
Independent dealer	8	12	11	6
Retail store	7	12	9	6
Value-added reseller	6	8	6	6
No idea at all	27	14	12	37
No answer	19	16	24	14

LOCAL AREA NETWORKS

RESULTS

Local area networks were defined to the respondent on the questionnaire as ways of linking a number of computers (in an office, for example) through communication lines so that they can share peripherals and data.

Current Usage

- About half of the respondents (47%) report that their companies have local area networks.
- Larger sized companies (100 or more employees) are much more likely to have local area networks than smaller sized companies (under 100 employees) -- 65% versus 24%. This finding is not unexpected since a company needs to have a fairly sizeable office and stable of computers to warrant such networking.
- Indicative of an active market, almost six out of 10 respondent companies (57%) with local area networks have acquired them in the past two years.

Brand Usage

- The leading brand of local area networks among companies that have them is AT&T (22%). AT&T's primary competitor, IBM, is not too far behind in second place (18%). Other brands are used by 6% or less of companies:

	Have Local Area Networks
AT&T	22%
IBM	18
DIGITAL EQUIPMENT CORPORATION (DEC)	6
3 COM	5
WANG	4
NORTHERN TELECOM	3
TELENET	2
HONEYWELL BULL	2
UNGERMANN BASS	1
BELL ATLANTIC	1
DATA GENERAL	1
ITT	1
THE SOFTWARE LINK	1
DCA	--

The low brand usage figures reported here may be somewhat misleading. It is quite possible that respondents more easily recalled the brands they are most familiar with and were less likely to recall the brands they are less familiar with. A large 37% of respondents in companies with local area networks could not recall the brand used or did not answer the question.

Ownership of Other Products and Systems

- Many of the companies -- 60% or more -- who have local area networks are also well-equipped with many other office products and systems:

	Have Local Area Networks
Office copiers	97%
Personal computers	89
Personal computer software	87
Dot matrix printers	81
Telecommunication systems and equipment	78
Mini-computers	73
Mainframe computers	65
Dictating equipment	63
Laser printers	60
Desktop publishing systems	48

Purchase-Decision Process

- Nearly five out of ten respondents (45%) report that their opinion is important in their companies' decisions to purchase local area network systems.

  Top management plays a central role in their companies' decisions to purchase local area networks -- 65% versus 45% for total respondents.

  Respondents in smaller sized companies, compared to larger sized companies, play a more influential role in the purchase decision -- 66% versus 32%.

  Respondents in wholesale or retail trade industries have an above-average influence on the purchase decision (54% versus 45% for total respondents).

- Respondents have a relatively low understanding of local area network systems. Less than one-third of respondents (31%) claim to be very or fairly knowledgeable about these systems. This finding lends support to the previous finding that respondents had trouble recalling the brand of local area network systems used by their companies.

- About three out of ten respondents (29%) claim involvement in the initial stage of the purchase decision process for local area network systems, while about one-fifth report involvement in the other stages that follow:

Initiation	29%
Specification	20
Evaluation	23
Recommendation	22
Authorization	22

Top managements' involvement in the authorization stage is as strong as it is in the initiation stage of the company process to purchase local area networks (42% versus 41%).

Factors Important in the Decision to Buy Local Area Networks

- The large majority of respondents (87%) report that their companies would be receptive to acquiring local area network systems. Larger sized companies are even more receptive than smaller sized companies (96% versus 75%).

- The most important factors -- reported by more than 15% of respondents -- in the decision to buy local area network systems are:

Manufacturer's reputation	19%
Reliability	18
Service	16

- The least important factors -- reported by 5% or less of respondents -- are:

Current product/system is obsolete	5%
Noise level	5
Memory size	5
American-made	4
Brand loyalty	4
Appearance	3
Always replace after a certain period of time	2

Not surprisingly, brand loyalty is not strong in a product area in which respondents claim below-average understanding.

Sources

- If respondents' companies were in the market for local area networks, the most preferred source would be buying directly from the vendor (20%). Next in line would be the manufacturer's representative (12%) and down the line even further -- at about 6% -- would be the independent dealer, the distributor, the retail store and the value-added reseller:

Directly from the vendor	20%
Manufacturer's representative	12
Independent dealer	6
Distributor	6
Retail store	5
Value-added reseller	5

For many of the office products and systems studied, smaller sized companies were found to be more open to buying from a variety of sources than were larger sized companies. In the case of local area networks, smaller sized companies are as partial to the vendor as larger sized companies.

CONCLUSION

Local area network systems are fairly common to business today. Top management plays a key role in bringing local area network systems into their companies. Manufacturers may need to strengthen brand awareness and brand image in order to counteract a low level of brand recognition and a lack of brand loyalty.

WHETHER COMPANY CURRENTLY USES
LOCAL AREA NETWORKS

	Total (469)	Company Size: < 100 (187)	100 + (269)
Currently used	47%	24%	65%
Not currently used	36	59	22
No idea at all	7	4	8
No answer	10	13	6

WHETHER PURCHASED LOCAL AREA NETWORKS
IN THE PAST TWO YEARS

	Have This Office Product/System:		
		Company Size:	
	Total	< 100	100 +
	(221)	(46)	(173)
Yes, purchased	57%	63%	56%
No, not purchased	20	33	17
No idea at all	20	--	25
No answer	4	5	3

BRAND NAMES OF LOCAL AREA NETWORKS
CURRENTLY USED IN COMPANY

	Have This Office Product/System (221)
AT&T	22%
IBM	18
DIGITAL EQUIPMENT CORPORATION (DEC)	6
3 COM	5
WANG	4
NORTHERN TPLECOM	3
TELENET	2
HONEYWELL BULL	2
UNGERMANN BASS	1
BELL ATLANTIC	1
DATA GENERAL	1
ITT	1
THE SOFTWARE LINK	1
DCA	--
Other	10
No idea at all	28
No answer	9

OTHER OFFICE PRODUCTS/SYSTEMS USED
BY COMPANIES THAT CURRENTLY HAVE LOCAL AREA NETWORKS

	Have Local Area Networks (221)
Office copiers	97%
Personal computers	89
Personal computer software	87
Dot matrix printers	81
Telecommunication systems and equipment	78
Mini-computers	73
Mainframe computers	65
Dictating equipment	63
Laser printers	60
Desktop publishing systems	48

IMPORTANCE OF RESPONDENT'S OPINION IN COMPANY DECISION
TO PURCHASE LOCAL AREA NETWORKS

	Total (469)	Company Size: < 100 (187)	Company Size: 100 + (269)	Top Management (214)
Very important	27%	47%	15%	44%
Fairly important	18	19	17	21
Not too important	20	15	24	15
Not at all important	22	6	33	9
No idea at all	7	5	7	4
No answer	7	9	3	7

DEMOGRAPHIC PROFILE OF PURCHASE DECISION-MAKERS
FOR LOCAL AREA NETWORKS

	Opinion Is Very/Fairly Important In Purchase Decision	
Total	45%	
Under 100 employees	66	
100 or more employees	32	
Principal Activity of Company		
Industrial		
Manufacturing, processing, publishing	41	
Transportation, communications, utilities	40	
Mining, oil or gas extraction	37*	
Construction	46	
Service		
Banking, finance, insurance, real estate	45	
Wholesale or retail trade	54	
Education	27	
Professional or business services	47	
Government	69*	
Job Title or Position		
Top Management	65	
Chairman of the board, president, CEO		72
Vice president		56
MIS director		43*
Chief information officer		73*
Other company officer or general manager		62
Owner, partner		69
Other management	33	
Professional	35	
Salesperson, broker, agent, representative	12	
Trainee, office worker, production worker	23*	
Skilled craftsman, laborer	11*	

*Based on less than 20 respondents.

KNOWLEDGE ABOUT LOCAL AREA NETWORKS

	Total (469)	Opinion Is Very/Fairly Important In Purchase Decision (211)	Top Management (214)
Very knowledgeable	7%	12%	8%
Fairly knowledgeable	24	32	25
Not too knowledgeable	37	35	36
Not at all knowledgeable	25	18	25
No answer	7	2	6

RESPONDENT INVOLVEMENT IN DECISION TO PURCHASE
LOCAL AREA NETWORKS

	Total (469)	Opinion Is Very/Fairly Important In Purchase Decision (211)	Company Size: ≤ 100 (187)	Company Size: 100 + (269)	Top Management (214)
Initiation	29%	52%	42%	21%	41%
Specification	20	39	31	14	29
Evaluation	23	47	38	14	35
Recommendation	22	42	35	15	31
Authorization	22	43	39	10	42
Not at all involved	41	11	21	55	25
No answer	11	7	14	7	12

WHETHER COMPANY WOULD PURCHASE
LOCAL AREA NETWORKS

	Total (469)	Opinion Is Very/Fairly Important In Purchase Decision (211)	Company Size: < 100 (187)	Company Size: 100 + (269)
Company would purchase	87%	83%	75%	96%
Company would never purchase	13	17	25	4

IMPORTANCE OF VARIOUS FACTORS IN DECISION TO PURCHASE
NEW LOCAL AREA NETWORKS

	Total (469)	Opinion Is Very/Fairly Important In Purchase Decision (211)	Company Size: < 100 (187)	Company Size: 100 + (269)
Manufacturer's reputation	19%	37%	22%	19%
Reliability	18	34	19	18
Service	16	30	19	14
Price	14	27	16	13
Quality	14	24	16	12
Performance	13	24	17	12
Ease of use	13	25	14	13
Special features	13	24	13	13
Compatibility with existing systems	12	25	13	13
Durability	12	24	14	11
Expandability/ability to upgrade	12	22	14	11
Connectivity	11	20	12	11
Networking ability	11	21	13	10
Cost of ownership including service and training	10	19	13	9
Support staff recommendations	10	19	10	11
Speed	10	19	11	9
Expert opinion	9	18	10	10
Current product/system is obsolete	5	10	5	5
Noise level	5	9	7	4
Memory size	5	9	7	4
American-made	4	8	6	2
Brand loyalty	4	6	3	4
Appearance	3	5	4	2
Always replace after a certain period of time	2	3	2	2

SOURCE WOULD USE TO PURCHASE LOCAL AREA NETWORKS

	Total (469)	Opinion Is Very/Fairly Important In Purchase Decision (211)	Company Size: < 100 (187)	Company Size: 100 + (269)
Directly from vendor	20%	25%	17%	24%
Manufacturer's representative	12	18	14	11
Independent dealer	6	10	9	4
Distributor	6	10	8	6
Retail store	5	8	7	4
Value-added reseller	5	8	6	4
No idea at all	29	15	23	13
No answer	18	19	23	13

TELECOMMUNICATION SYSTEMS AND EQUIPMENT

RESULTS

Telecommunication systems and equipment were defined to the respondent on the questionnaire as telephone systems for voice and/or data needs.

Current Usage

- Telecommunication systems and equipment are fairly widely owned relative to the other office products and systems studied. About six out of ten respondents (61%) report that their companies have them.

- Larger sized companies (100 or more employees) are much more likely to own telecommunication systems and equipment than smaller sized companies (less than 100 employees) -- 72% versus 49%.

- The market for telecommunication systems and equipment has been active. Two-thirds of companies with telecommunication systems and equipment (67%) bought them in the past two years. Both larger and smaller sized companies have been in need of these systems.

Brand Usage

- In companies that have telecommunication systems and equipment, AT&T is out in front (35%). Far behind are IBM/ROLM (11%), Northern Telecom (8%) and MCI (6%). Other brands are owned by 5% or less of companies:

	Have Telecommunication Systems and Equipment
AT&T	35%
IBM/ROLM	11
NORTHERN TELECOM	8
MCI	6
GTE	5
SOUTHWESTERN BELL	4
EXECUTONE	4
AMERITECH	3
BELLSOUTH	3
NYNEX	3
NEC	3
TOSHIBA	3
BELL ATLANTIC	2
PACIFIC TELESIS	2
DICTAPHONE	2
WANG	2
US WEST	1
CONTEL	1
SIEMENS	1
CANON	1
DAVOX	--

AT&T's overwhelming leadership is not surprising since AT&T has been a giant in this industry for decades. It is possible, however, that respondents' companies have other brands of telecommunication systems and equipment but that the brand names do not easily come to mind. A low level of brand recognition may account for some of the low incidence scores reported.

Ownership of Other Office Products and Systems

- Companies that have telecommunication systems and equipment are widely equipped with other types of office equipment:

	Have Telecommunication Systems and Equipment
Office copiers	95%
Personal computers	92
Personal computer software	89
Dot matrix printers	79
Mini-computers	65
Local area networks	61
Laser printers	60
Dictating equipment	59
Mainframe computers	54
Desktop publishing systems	40

Purchase-Decision Process

- Close to one-half of respondents (49%) report that their opinion is important in their companies' decisions to purchase telecommunication systems and equipment.

  Top management level respondents are very influential in their companies' purchase decisions of telecommunication systems and equipment (67% versus 49% of total respondents).

  Respondents in smaller sized companies are more influential in the purchase decision than respondents in larger sized companies (71% versus 35%).

  Those in the wholesale or retail trade are above-average in terms of influence in their companies' purchase decisions regarding these systems (57% versus 49% of total respondents).

- Close to five out of ten respondents (45%) report that they are very or fairly knowledgeable about telecommunication systems and equipment. Influential purchase decision-makers report even greater knowledgeability (61%) of these systems.

- About one-third of respondents (31%) are involved in the initiation stage of the purchase decision process, while one-quarter of respondents are involved in the other stages of the process:

Initiation	31%
Specification	24
Evaluation	24
Recommendation	25
Authorization	24

  About one-half of top management respondents are involved in the authorization stage and in the initiation stage of the purchase-decision process (46% versus 45%).

Factors Important in the Decision to Buy Telecommunication Systems and Equipment

- The vast majority of respondents (92%) work in companies which would be receptive to procuring telecommunication systems and equipment.

- The most important factors -- reported by 17% or more of respondents -- in purchasing telecommunication systems and equipment are:

Manufacturer's reputation	23%
Reliability	22
Service	19
Special features	18
Price	18
Ease of use	17
Quality	17
Durability	17

Clearly, AT&T's established reputation over time places other manufacturers at a disadvantage. The competition may need to stress other benefits such as dependability, service, special features, and low cost to gain a competitive edge and build recognition.

- The least important factors -- indicated by 5% or less of respondents -- are:

American-made	5%
Appearance	5
Brand loyalty	4
Always replace after a certain period of time	2

Importantly, brand loyalty is not a given in this office system field.

Sources

- When given the choice, respondents much prefer buying telecommunication systems and equipment directly from the vendor (28%). Second choice would be the manufacturer's representative (13%) and least of all, distributors (7%), independent dealers (6%), value-added resellers (5%), and retail stores (4%). These preferences hold true for both smaller sized companies and larger sized companies.

Directly from the vendor	28%
Manufacturer's representative	13
Distributor	7
Independent dealer	6
Value-added reseller	5
Retail store	4

CONCLUSION

Telecommunication systems and equipment are in wide demand among the respondents surveyed. Top management is very influential in their companies' decisions to buy telecommunication systems and equipment. AT&T has the greatest market share in this field although low familiarity with other brands may be responsible for some of the low usage scores registered. In terms of brand selection, brand reputation was found to be much more important to respondents than brand loyalty.

WHETHER COMPANY CURRENTLY USES
TELECOMMUNICATION SYSTEMS AND EQUIPMENT

	Total	Company Size:	
		< 100	100 +
	(469)	(187)	(269)
Currently used	61%	49%	72%
Not currently used	27	40	18
No idea at all	5	2	5
No answer	8	9	5

WHETHER PURCHASED TELECOMMUNICATION SYSTEMS AND EQUIPMENT IN THE PAST TWO YEARS

	Have This Office Product/System:		
		Company Size:	
	Total (287)	< 100 (91)	100 + (194)
Yes, purchased	67%	68%	67%
No, not purchased	15	26	10
No idea at all	14	1	20
No answer	4	5	3

BRAND NAMES OF TELECOMMUNICATION SYSTEMS AND EQUIPMENT
CURRENTLY USED IN COMPANY

	Have This Office Product/System (287)
AT&T	35%
IBM/ROLM	11
NORTHERN TELECOM	8
MCI	6
GTE	5
SOUTHWESTERN BELL	4
EXECUTONE	4
AMERITECH	3
BELLSOUTH	3
NYNEX	3
NEC	3
TOSHIBA	3
BELL ATLANTIC	2
PACIFIC TELESIS	2
DICTAPHONE	2
WANG	2
US WEST	1
CONTEL	1
SIEMENS	1
CANON	1
DAVOX	--
Other	7
No idea at all	19
No answer	8

OTHER OFFICE PRODUCTS/SYSTEMS
USED BY COMPANIES THAT CURRENTLY HAVE
TELECOMMUNICATION SYSTEMS AND EQUIPMENT

	Have Telecommunication Systems and Equipment (287)
Office copiers	95%
Personal computers	92
Personal computer software	89
Dot matrix printers	79
Mini-computers	65
Local area networks	61
Laser printers	60
Dictating equipment	59
Mainframe computers	54
Desktop publishing systems	40

IMPORTANCE OF RESPONDENT'S OPINION IN COMPANY DECISION
TO PURCHASE TELECOMMUNICATION SYSTEMS AND EQUIPMENT

	Total (469)	Company Size: < 100 (187)	Company Size: 100 + (269)	Top Management (214)
Very important	30%	50%	17%	47%
Fairly important	19	21	18	20
Not too important	20	13	26	15
Not at all important	20	5	30	3
No idea at all	5	3	6	3
No answer	7	8	4	7

DEMOGRAPHIC PROFILE OF PURCHASE DECISION-MAKERS
FOR TELECOMMUNICATION SYSTEMS AND EQUIPMENT

	Opinion Is Very/Fairly Important In Purchase Decision	
Total	49%	
Under 100 employees	71	
100 or more employees	35	
Principal Activity of Company		
Industrial		
Manufacturing, processing, publishing	47	
Transportation, communications, utilities	48	
Mining, oil or gas extraction	37*	
Construction	49	
Service		
Banking, finance, insurance, real estate	48	
Wholesale or retail trade	57	
Education	36	
Professional or business services	51	
Government	50*	
Job Title or Position		
Top Management	67	
Chairman of the board, president, CEO		75
Vice president		51
MIS director		59*
Chief information officer		73*
Other company officer or general manager		61
Owner, partner		74
Other management	37	
Professional	37	
Salesperson, broker, agent, representative	29	
Trainee, office worker, production worker	23*	
Skilled craftsman, laborer	18*	

*Based on less than 20 respondents.

KNOWLEDGE ABOUT TELECOMMUNICATION SYSTEMS AND EQUIPMENT

	Total (469)	Opinion Is Very/Fairly Important In Purchase Decision (226)	Top Management (214)
Very knowledgeable	13%	20%	13%
Fairly knowledgeable	32	41	35
Not too knowledgeable	31	24	30
Not at all knowledgeable	18	12	18
No answer	6	3	4

RESPONDENT INVOLVEMENT IN DECISION TO PURCHASE
TELECOMMUNICATION SYSTEMS AND EQUIPMENT

	Total (469)	Opinion Is Very/Fairly Important In Purchase Decision (226)	Company Size: < 100 (187)	Company Size: 100 + (269)	Top Management (214)
Initiation	31%	55%	45%	23%	45%
Specification	24	42	35	18	34
Evaluation	24	42	37	16	34
Recommendation	25	44	38	18	37
Authorization	24	46	41	14	46
Not at all involved	36	10	18	49	17
No answer	11	5	12	7	10

WHETHER COMPANY WOULD PURCHASE
TELECOMMUNICATION SYSTEMS AND EQUIPMENT

	Total	Opinion Is Very/Fairly Important In Purchase Decision	Company Size:	
			< 100	100 +
	(469)	(226)	(187)	(269)
Company would purchase	92%	88%	82%	98%
Company would never purchase	8	12	18	2

IMPORTANCE OF VARIOUS FACTORS IN DECISION TO PURCHASE
NEW TELECOMMUNICATION SYSTEMS AND EQUIPMENT

	Total (469)	Opinion Is Very/Fairly Important In Purchase Decision (226)	Company Size: < 100 (187)	Company Size: 100 + (269)
Manufacturer's reputation	23%	42%	30%	20%
Reliability	22	39	24	21
Service	19	35	23	17
Special features	18	32	21	17
Price	18	31	24	14
Ease of use	17	30	20	15
Quality	17	30	23	14
Durability	17	32	22	14
Performance	14	26	19	11
Expandability/ability to upgrade	13	25	15	12
Compatibility with existing systems	13	23	15	12
Support staff recommendations	13	22	15	12
Cost of ownership including service and training	13	23	16	11
Expert opinion	10	17	12	8
Connectivity	9	16	10	8
Speed	9	16	10	8
Networking ability	9	16	10	9
Noise level	8	14	10	7
Current product/system is obsolete	7	14	10	6
Memory size	7	12	9	6
American-made	5	9	8	3
Appearance	5	9	6	4
Brand loyalty	4	7	3	5
Always replace after a certain period of time	2	3	3	1

SOURCE WOULD USE TO PURCHASE
TELECOMMUNICATION SYSTEMS AND EQUIPMENT

	Total (469)	Opinion Is Very/Fairly Important In Purchase Decision (226)	Company Size: < 100 (187)	Company Size: 100 + (269)
Directly from vendor	28%	35%	23%	32%
Manufacturer's representative	13	18	13	14
Distributor	7	11	8	6
Independent dealer	6	10	11	3
Value-added reseller	5	7	4	6
Retail store	4	6	5	3
No idea at all	28	16	14	38
No answer	17	14	22	12

DICTATING EQUIPMENT

RESULTS

Dictating equipment was defined to the respondent on the questionnaire as voice recording and replay devices.

Current Usage

- Dictating equipment is not as widely owned as might be expected. Approximately one-half of respondent companies (49%) have dictating equipment (at least as far as the respondent is aware).

- Larger sized companies (100 or more employees) are twice as likely to have dictating equipment as smaller sized companies (under 100 employees) -- 63% versus 32%.

- Six out of ten respondent companies (60%) with dictating equipment have bought the equipment in the past two years. This finding indicates that there is considerable vitality in the marketplace for such equipment.

Brand Usage

- The leading brand of dictating equipment in companies with it is Dictaphone (33%). Dictaphone leads its nearest competitor, Lanier, by 10 percentage points and its next nearest competitor, Norelco, by 17 percentage points. Sony and Panasonic are owned by about 10% of respondent companies, and Toshiba is owned by a slight 1% of respondent companies:

	Have Dictating Equipment
DICTAPHONE	33%
LANIER	23
NORELCO	16
SONY	11
PANASONIC	10
TOSHIBA	1

Ownership of Other Office Products and Systems

- Companies that have dictating equipment are well-equipped with other types of office products and equipment:

	Have Dictating Equipment
Office copiers	99%
Personal computers	91
Personal computer software	89
Dot matrix printers	77
Telecommunication systems and equipment	73
Mini-computers	69
Local area networks	61
Laser printers	60
Mainframe computers	58
Desktop publishing systems	45

Purchase-Decision Process

- About five out of ten respondents (45%) report that their influence is very or fairly important in their companies' decisions to purchase dictating equipment.

  Top management plays a central role in their companies' decisions to purchase dictating equipment (67% versus 45% for total respondents).

  Respondents in smaller sized companies are more influential in the purchase decision process than respondents in larger sized companies (67% versus 31%).

  Those in wholesale or retail trade and in professional or business services have above-average influence in the purchase decision (55% and 50%, respectively, versus 45% for total respondents).

- Respondents are as knowledgeable about dictating equipment as they are, on average, about the other office products and systems studied. About one-half (49%) indicate that they are very or fairly knowledgeable in this area.

- About one-quarter of respondents are involved in each stage of their companies' decisions to purchase dictating equipment -- from the initiation phase to the authorization phase:

Initiation	28%
Specification	21
Evaluation	22
Recommendation	23
Authorization	26

Top management plays a stronger role in each stage of the purchase decision process and is somewhat more involved in the authorization stage than in the initiation stage (47% versus 43%).

Factors Important in the Decision to Buy Dictating Equipment

- A vast majority of respondents (86%) report that their companies would be receptive to purchasing dictating equipment.

- The most important factors -- reported by more than 15% of respondents -- in the decision to acquire dictating equipment are:

Reliability	20%
Manufacturer's reputation	20
Durability	18
Ease of use	18
Service	17
Price	16

Prospective buyers of dictating equipment require reliable, dependable, easy service from reputable manufacturers.

- The least important factors -- considered by 5% or less of respondents -- are:

Appearance	5%
Current product/system is obsolete	5
American-made	4
Brand loyalty	4
Networking ability	4
Always replace after a certain period of time	2

Reliable, dependable, service that is easy to use overrides how the equipment looks, where it comes from and whether the brand has been traditionally used.

Sources

- If given the option, buying dictating equipment direct from the vendor is the preferred route. Next most preferred is the manufacturer's representative (13%), the retail store (12%), and the distributor or independent dealer (11%, respectively). The least preferred route is the value-added reseller -- mentioned by a marginal 3% of

respondents. This pattern holds up across larger sized and smaller sized companies.

Directly from vendor	16%
Manufacturer's representative	13
Retail store	12
Distributor	11
Independent dealer	11
Value-added reseller	3

CONCLUSION

Dictating equipment is not as prevalent in companies as might be expected. There is, however, considerable purchasing activity taking place. Top management respondents are very influential in their companies' decisions to purchase the equipment. Reliable, dependable, easy-to-use service from a reputable manufacturer is what respondents look for in dictating equipment. By comparison, brand loyalty tends not to be important.

WHETHER COMPANY CURRENTLY USES
DICTATING EQUIPMENT

	Total (469)	Company Size: < 100 (187)	100 + (269)
Currently used	49%	32%	63%
Not currently used	35	53	23
No idea at all	9	5	11
No answer	8	10	4

WHETHER PURCHASED DICTATING EQUIPMENT
IN THE PAST TWO YEARS

	Have This Office Product/System:		
		Company Size:	
	Total	< 100	100 +
	(230)	(60)	(168)
Yes, purchased	60%	61%	59%
No, not purchased	16	27	12
No idea at all	19	5	24
No answer	6	8	5

BRAND NAMES OF DICTATING EQUIPMENT
CURRENTLY USED IN COMPANY

	Have This Office Product/System (230)
DICTAPHONE	33%
LANIER	23
NORELCO	16
SONY	11
PANASONIC	10
TOSHIBA	1
Other	2
No idea at all	20
No answer	5

OTHER OFFICE PRODUCTS/SYSTEMS
USED BY COMPANIES THAT CURRENTLY HAVE DICTATING EQUIPMENT

	Have Dictating Equipment (230)
Office copiers	99%
Personal computers	91
Personal computer software	89
Dot matrix printers	77
Telecommunication systems and equipment	73
Mini-computers	69
Local area networks	61
Laser printers	60
Mainframe computers	58
Desktop publishing systems	45

IMPORTANCE OF RESPONDENT'S OPINION IN COMPANY DECISION
TO PURCHASE DICTATING EQUIPMENT

	Total (469)	Company Size: < 100 (187)	Company Size: 100 + (269)	Top Management (214)
Very important	27%	50%	13%	47%
Fairly important	18	17	18	20
Not too important	22	13	29	14
Not at all important	22	9	32	11
No idea at all	5	3	6	2
No answer	6	9	3	6

DEMOGRAPHIC PROFILE OF PURCHASE DECISION-MAKERS
FOR DICTATING EQUIPMENT

	Opinion Is Very/Fairly Important In Purchase Decision	
Total	45%	
Under 100 employees	67	
100 or more employees	31	
Principal Activity of Company		
Industrial		
Manufacturing, processing, publishing	42	
Transportation, communications, utilities	32	
Mining, oil or gas extraction	37	
Construction	51*	
Service		
Banking, finance, insurance, real estate	42	
Wholesale or retail trade	55	
Education	24	
Professional or business services	50	
Government	69*	
Job Title or Position		
Top Management	67	
Chairman of the board, president, CEO		76
Vice president		63
MIS director		16*
Chief information officer		73*
Other company officer or general manager		62
Owner, partner		70
Other management	28	
Professional	24	
Salesperson, broker, agent, representative	18	
Trainee, office worker, production worker	23*	
Skilled craftsman, laborer	22*	

*Based on less than 20 respondents.

KNOWLEDGE ABOUT DICTATING EQUIPMENT

	Total (469)	Opinion Is Very/Fairly Important In Purchase Decision (210)	Top Management (214)
Very knowledgeable	15%	21%	16%
Fairly knowledgeable	34	44	40
Not too knowledgeable	26	21	22
Not at all knowledgeable	21	12	20
No answer	5	1	2

RESPONDENT INVOLVEMENT IN DECISION TO PURCHASE
DICTATING EQUIPMENT

	Total (469)	Opinion Is Very/Fairly Important In Purchase Decision (210)	Company Size: < 100 (187)	Company Size: 100 + (269)	Top Management (214)
Initiation	28%	49%	43%	19%	43%
Specification	21	38	30	15	29
Evaluation	22	40	34	15	34
Recommendation	23	41	36	15	33
Authorization	26	49	40	17	47
Not at all involved	41	12	23	54	19
No answer	10	6	12	5	10

WHETHER COMPANY WOULD PURCHASE
DICTATING EQUIPMENT

	Total (469)	Opinion Is Very/Fairly Important In Purchase Decision (210)	Company Size: < 100 (187)	Company Size: 100 + (269)
Company would purchase	86%	82%	72%	95%
Company would never purchase	14	18	28	5

IMPORTANCE OF VARIOUS FACTORS IN DECISION TO PURCHASE
NEW DICTATING EQUIPMENT

	Total (469)	Opinion Is Very/Fairly Important In Purchase Decision (210)	Company Size: < 100 (187)	Company Size: 100 + (269)
Reliability	20%	36%	22%	20%
Manufacturer's reputation	20	35	24	18
Durability	18	31	21	17
Ease of use	18	32	19	18
Service	17	31	22	14
Price	16	30	20	15
Quality	15	27	21	12
Special features	15	27	16	14
Performance	12	22	15	10
Cost of ownership including service and training	11	21	14	9
Compatibility with existing systems	10	18	11	9
Support staff recommendations	8	15	12	6
Expandability/ability to upgrade	8	16	11	6
Noise level	7	14	10	6
Memory size	6	12	10	4
Connectivity	6	11	7	6
Speed	6	13	8	5
Expert opinion	6	12	9	4
Appearance	5	10	6	5
Current product/system is obsolete	5	10	7	4
American-made	4	9	6	3
Brand loyalty	4	9	6	3
Networking ability	4	8	6	2
Always replace after a certain period of time	2	4	2	2

SOURCE WOULD USE TO PURCHASE
DICTATING EQUIPMENT

	Total (469)	Opinion Is Very/Fairly Important In Purchase Decision (210)	Company Size: ≤ 100 (187)	Company Size: 100 + (269)
Directly from vendor	16%	21%	13%	19%
Manufacturer's representative	13	15	11	15
Retail store	12	15	14	11
Distributor	11	15	8	14
Independent dealer	11	15	10	12
Value-added reseller	3	4	3	4
No idea at all	24	9	9	34
No answer	18	17	23	12

OFFICE COPIERS

RESULTS

Office copiers were defined to the respondent on the questionnaire as copying machines designed for general office use; not the large equipment used in central duplicating or printing departments.

Current Usage

- The overwhelming majority of respondents (88%) report that their companies have office copiers. Office copiers are the most widely owned of the 11 office products and systems studied.

- Office copiers are in demand. Almost three-quarters of respondents (73%) in companies with copiers report that they have bought them in the past two years. Both larger sized companies (100 or more employees) and smaller sized companies (under 100 employees) are in the market now.

Brand Usage

- The foremost brand in the office copier category is Xerox -- owned by 41% of companies with office copiers. At quite a distance from Xerox is Canon (22%), followed by IBM (16%), Kodak (11%), and Sharp (11%). Other brands are owned by less than 10% of the companies studied:

	Have Office Copiers
XEROX	41%
CANON	22
IBM	16
KODAK	11
SHARP	11
RICOH	9
SAVIN	9
MINOLTA	7
PANASONIC	5
MITA	5
TOSHIBA	3
HARRIS/3M	2
KONICA	1

Ownership of Other Office Products and Systems

- The majority of companies that have office copiers also own many of the other types of office products and systems studied:

	Have Office Copiers
Personal computers	85%
Personal computer software	81
Dot matrix printers	73
Telecommunication systems and equipment	66
Mini-computers	59
Dictating equipment	55
Local area networks	52
Laser printers	51
Mainframe computers	49
Desktop publishing systems	36

Purchase-Decision Process

- About six out of ten respondents (57%) report that their opinion is very or fairly important in their companies' decisions to buy office copiers.

  Top management is significantly more involved in their companies' decisions to purchase office copiers (76% versus 57% of total respondents).

  Respondents in smaller sized companies are more influential in the purchase decision than respondents in larger sized companies (80% versus 41%).

  The opinions of respondents in wholesale or retail trades carry above-average weight in the purchase decision (74% versus 57% of total respondents).

- Respondents are considerably knowledgeable about office copiers. About eight out of ten respondents (83%) indicate that they are very or fairly knowledgeable about them.

- Close to three out of ten respondents report that they are involved in each of the five stages of the purchase-decision process -- initiation, specification, evaluation, recommendation and authorization:

Initiation	32%
Specification	26
Evaluation	28
Recommendation	28
Authorization	27

Top management respondents report somewhat heavier involvement in the authorization phase than in the initiation phase (49% versus 44%) of the decision process.

Factors Important in the Decision to Buy Office Copiers

- Virtually no one is opposed to having office copiers in their companies.

- The most important factors -- reported by greater than 25% of respondents -- in the decision to buy office copiers are:

Reliability	33%
Manufacturer's reputation	32
Durability	29
Service	29
Ease of use	27
Price	27
Special features	26

Respondents indicate that they want reliable, dependable service from a reputable manufacturer in their choice of office copiers.

- The least important factors -- reported by 5% or less of respondents are:

Brand loyalty	5%
Networking ability	5
Always replace after a certain period of time	4

Clearly, brand loyalty is a marginal consideration in the selection of office copiers.

Sources

- If companies were in the market to buy office copiers now, their strongest preference would be to buy directly from the vendor (30%). Less preference would be given to manufacturers' representatives (19%), distributors (14%) and independent dealers (12%). Respondents are least partial to retail stores (8%) and value-added resellers (4%). In contrast, smaller sized companies are almost as likely to

favor buying office copiers from the manufacturers' representatives (20%) as from the vendor directly (22%).

Directly from vendor	30%
Manufacturer's representative	19
Distributor	14
Independent dealer	12
Retail store	8
Value-added reseller	4

CONCLUSION

Office copiers are omnipresent in companies today, and the market for them is still growing strong. Top management is both very influential in the purchase-decision process and very knowledgeable about them. Respondents look for reliable, dependable service from a reputable manufacturer when looking to buy office copiers and do not take brand loyalty into almost any account in the selection process.

WHETHER COMPANY CURRENTLY USES
OFFICE COPIERS

	Total (469)	Company Size: < 100 (187)	100 + (269)
Currently used	88%	81%	97%
Not currently used	7	15	2
No idea at all	2	1	1
No answer	3	4	1

WHETHER PURCHASED OFFICE COPIERS
IN THE PAST TWO YEARS

	Have This Office Product/System:		
		Company Size:	
	Total	< 100	100 +
	(414)	(151)	(260)
Yes, purchased	73%	70%	75%
No, not purchased	14	24	8
No idea at all	10	2	14
No answer	4	5	3

BRAND NAMES OF OFFICE COPIERS
CURRENTLY USED IN COMPANY

	Have This Office Product/System (414)
XEROX	41%
CANON	22
IBM	16
KODAK	11
SHARP	11
RICOH	9
SAVIN	9
MINOLTA	7
PANASONIC	5
MITA	5
TOSHIBA	3
HARRIS/3M	2
KONICA	1
Other	2
No idea at all	5
No answer	5

OTHER OFFICE PRODUCTS/SYSTEMS
USED BY COMPANIES THAT CURRENTLY HAVE OFFICE COPIERS

	Have Office Copiers (414)
Personal computers	85%
Personal computer software	81
Dot matrix printers	73
Telecommunication systems and equipment	66
Mini-computers	59
Dictating equipment	55
Local area networks	52
Laser printers	51
Mainframe computers	49
Desktop publishing systems	36

IMPORTANCE OF RESPONDENT'S OPINION IN COMPANY DECISION TO PURCHASE OFFICE COPIERS

	Total (469)	Company Size: < 100 (187)	Company Size: 100 + (269)	Top Management (214)
Very important	35%	60%	18%	52%
Fairly important	22	20	23	24
Not too important	20	11	27	14
Not at all important	17	4	25	6
No idea at all	4	2	5	1
No answer	4	4	2	3

DEMOGRAPHIC PROFILE OF PURCHASE DECISION-MAKERS
FOR OFFICE COPIERS

	Opinion Is Very/Fairly Important In Purchase Decision
Total	57%
Under 100 employees	80
100 or more employees	41
Principal Activity of Company	
Industrial	
Manufacturing, processing, publishing	52
Transportation, communications, utilities	50
Mining, oil or gas extraction	60*
Construction	60
Service	
Banking, finance, insurance, real estate	52
Wholesale or retail trade	74
Education	55
Professional or business services	59
Government	69*
Job Title or Position	
Top Management	76
Chairman of the board, president, CEO	85
Vice president	66
MIS director	50*
Chief information officer	47*
Other company officer or general manager	79
Owner, partner	76
Other management	44
Professional	39
Salesperson, broker, agent, representative	31
Trainee, office worker, production worker	29*
Skilled craftsman, laborer	36*

*Based on less than 20 respondents.

KNOWLEDGE ABOUT OFFICE COPIERS

	Total (469)	Opinion Is Very/Fairly Important In Purchase Decision (264)	Top Management (214)
Very knowledgeable	34%	39%	31%
Fairly knowledgeable	49	48	51
Not too knowledgeable	11	9	13
Not at all knowledgeable	4	2	3
No answer	3	2	1

RESPONDENT INVOLVEMENT IN DECISION TO PURCHASE
OFFICE COPIERS

	Total (469)	Opinion Is Very/Fairly Important In Purchase Decision (264)	Company Size: < 100 (187)	Company Size: 100 + (269)	Top Management (214)
Initiation	32%	47%	48%	23%	44%
Specification	26	40	38	19	36
Evaluation	28	40	42	19	38
Recommendation	28	42	41	21	36
Authorization	27	43	45	15	49
Not at all involved	32	11	12	47	14
No answer	8	6	9	4	7

WHETHER COMPANY WOULD PURCHASE
OFFICE COPIERS

	Total (469)	Opinion Is Very/Fairly Important In Purchase Decision (264)	Company Size: < 100 (187)	Company Size: 100 + (269)
Company would purchase	98%	98%	97%	99%
Company would never purchase	2	2	3	1

IMPORTANCE OF VARIOUS FACTORS IN DECISION TO PURCHASE
NEW OFFICE COPIERS

	Total (469)	Opinion Is Very/Fairly Important In Purchase Decision (264)	Company Size: < 100 (187)	Company Size: 100 + (269)
Reliability	33%	48%	41%	28%
Manufacturer's reputation	32	46	42	27
Durability	29	43	38	25
Service	29	42	36	25
Ease of use	27	39	32	25
Price	27	39	37	22
Special features	26	37	32	23
Quality	24	34	31	21
Performance	21	30	26	18
Noise level	19	25	25	15
Cost of ownership including service and training	18	26	25	14
Speed	18	25	21	18
Support staff recommendations	13	17	18	9
Expandability/ability to upgrade	10	14	13	9
Compatibility with existing systems	9	13	13	7
Expert opinion	9	11	11	7
Current product/system is obsolete	8	11	11	6
Connectivity	7	10	8	8
Appearance	7	11	10	6
Memory size	6	9	10	4
American-made	6	9	10	3
Brand loyalty	5	8	5	5
Networking ability	5	7	8	4
Always replace after a certain period of time	4	5	4	4

SOURCE WOULD USE TO PURCHASE
OFFICE COPIERS

	Total (469)	Opinion Is Very/Fairly Important In Purchase Decision (264)	Company Size: < 100 (187)	Company Size: 100 + (269)
Directly from vendor	30%	32%	22%	37%
Manufacturer's representative	19	22	20	20
Distributor	14	15	17	12
Independent dealer	12	16	17	8
Retail store	8	9	13	5
Value-added reseller	4	5	5	3
No idea at all	20	11	10	27
No answer	16	18	19	12

APPENDIX

Comparison Of The

Use And Purchase Of

Office Products And Systems

Among Respondents And Non-Respondents

COMPANY USAGE
OF VARIOUS TYPES OF OFFICE PRODUCTS AND SYSTEMS
AMONG RESPONDENTS AND NON-RESPONDENTS

	Population Estimate	Respondents (469)	Non-Respondents (100)
Mainframe computers	47%	44%	48%
Mini-computers	58	55	59
Personal computers	72	80	68
Personal computer software	71	76	68
Laser printers	44	45	44
Dot matrix printers	56	69	50
Desktop publishing systems	27	33	25
Local area networks	41	47	38
Telecommunication systems and equipment	56	61	54
Dictating equipment	48	49	48
Office copiers	84	88	82

INFLUENCE ON DECISION-MAKING AND KNOWLEDGEABILITY OF OFFICE PRODUCTS/SYSTEMS
AMONG RESPONDENTS AND NON-RESPONDENTS

	Opinion Is Very/Fairly Important In Purchase Decision			Very/Fairly Knowledgeable About This Type Of Office Product/System		
	Population Estimate	Respondents (469)	Non-Respondents (100)	Population Estimate	Respondents (469)	Non-Respondents (100)
Mainframe computers	41%	39%	42%	25%	28%	23%
Mini-computers	47	46	48	46	44	47
Personal computers	61	65	59	70	75	68
Personal computer software	58	64	56	62	66	60
Laser printers	47	50	45	38	36	39
Dot matrix printers	46	51	43	52	56	49
Desktop publishing systems	41	45	40	23	23	24
Local area networks	48	45	49	31	31	30
Telecommunication systems and equipment	48	49	48	39	45	36
Dictating equipment	41	45	39	44	49	42
Office copiers	55	57	54	82	83	82

JOB TITLE OR POSITION
OF RESPONDENTS AND NON-RESPONDENTS

	Population Estimate	Respondents (469)	Non-Respondents (100)
Top Management	43%	46%	42%
Chairman of the board, president, CEO	9	12	7
Vice president	12	9	13
MIS director	2	2	1
Chief information officer	1	1	2
Other company officer or general manager	8	9	7
Owner, partner	12	14	12
Other management	18	22	16
Professional	12	12	11
Salesperson, broker, agent, representative	11	8	11
Trainee, office worker, production worker	5	3	6
Skilled craftsman, laborer	6	4	8
Student	--	--	--
Retired	3	4	3
Housewife	1	--	1
No answer	1	1	1

NUMBER OF EMPLOYEES IN ENTIRE CORPORATION OR FIRM
AMONG RESPONDENTS AND NON-RESPONDENTS

	Population Estimate	Respondents (469)	Non-Respondents (100)
Less than 25 employees	25%	29%	23%
25 - 99 employees	18	12	21
100 - 999 employees	20	18	20
1,000 or more employees	36	39	34
No answer	2	3	2

Mailing Materials

And Telephone Questionnaire

FORTUNE

WILL YOU DO US A FAVOR?

We are conducting a nationwide survey on the types of equipment used in offices and how that equipment is purchased. We are turning to you for help so that we can understand and serve **your** needs better.

Because we are sending it only to a scientifically selected sample, your answers are essential to the accuracy of this study. In an effort to obtain a truly representative sample, we are offering a major incentive to cooperate in the study. Each person participating in the study will have a chance to win $1000.

When you have completed the questionnaire, fill out the enclosed drawing entry form and return both the questionnaire and form in the stamped envelope provided. We would deeply appreciate your cooperation.

All of your answers to the questions will be kept confidential. Your responses will be used only in combination with those of other people and will never be quoted. FORTUNE has hired Beta Research Corp., an independent organization, to compile and tabulate the results of this survey.

Thank you for your help with this important project.

Sincerely,

James B. Hayes
Publisher

P.S. The enclosed dollar bill is meant only as a token of appreciation. It may brighter the day of a youngster you know.

OFFICE EQUIPMENT POLL

1. For each of the office products and systems listed below, please "X" whether that product or system is **currently used** in your company.

	Currently Used	Not Currently Used	No Idea At All	
Mainframe computers (large, complex computer installations)	-1 ☐	-2 ☐	-3 ☐	(6)
Mini-computers (mid-range computers for medium- to high-level computational applications)	-1 ☐	-2 ☐	-3 ☐	(7)
Personal computers (small computers designed for individual use)	-1 ☐	-2 ☐	-3 ☐	(8)
Personal computer software (programs for personal computers)	-1 ☐	-2 ☐	-3 ☐	(9)
Laser printers (printers which produce typeset quality characters)	-1 ☐	-2 ☐	-3 ☐	(10)
Dot matrix printers (printers which produce characters formed of dots which do not have the high-quality appearance produced by a typewriter or letter-quality printer)	-1 ☐	-2 ☐	-3 ☐	(11)
Desktop publishing systems (combinations of hardware and software which enable the user to produce typeset-quality reports and presentations)	-1 ☐	-2 ☐	-3 ☐	(12)
Local area networks (ways of linking a number of computers [in an office, for example] through communication lines so that they can share peripherals and data)	-1 ☐	-2 ☐	-3 ☐	(13)
Telecommunication systems and equipment (telephone systems for voice and/or data needs)	-1 ☐	-2 ☐	-3 ☐	(14)
Dictating equipment (voice recording and replay devices)	-1 ☐	-2 ☐	-3 ☐	(15)
Office copiers (copying machines designed for general office use; **not** the large equipment used in central duplicating or printing departments)	-1 ☐	-2 ☐	-3 ☐	(16)

2. How **knowledgeable** would you say you are about each of these office products or systems?

	Very Knowledgeable	Fairly Knowledgeable	Not Too Knowledgeable	Not At All Knowledgeable	
Mainframe computers	-1 ☐	-2 ☐	-3 ☐	-4 ☐	(17)
Mini-computers	-1 ☐	-2 ☐	-3 ☐	-4 ☐	(18)
Personal computers	-1 ☐	-2 ☐	-3 ☐	-4 ☐	(19)
Personal computer software	-1 ☐	-2 ☐	-3 ☐	-4 ☐	(20)
Laser printers	-1 ☐	-2 ☐	-3 ☐	-4 ☐	(21)
Dot matrix printers	-1 ☐	-2 ☐	-3 ☐	-4 ☐	(22)
Desktop publishing systems	-1 ☐	-2 ☐	-3 ☐	-4 ☐	(23)
Local area networks	-1 ☐	-2 ☐	-3 ☐	-4 ☐	(24)
Telecommunication systems and equipment	-1 ☐	-2 ☐	-3 ☐	-4 ☐	(25)
Dictating equipment	-1 ☐	-2 ☐	-3 ☐	-4 ☐	(26)
Office copiers	-1 ☐	-2 ☐	-3 ☐	-4 ☐	(27)

3. How **important** would you say **your opinion is if** your company **were to make a decision** to purchase these products and systems? (PLEASE "X" THE APPROPRIATE BOX FOR EACH PRODUCT AND SYSTEM.)

	Very Important	Fairly Important	Not Too Important	Not At All Important	No Idea At All	
Mainframe computers	-1 ☐	-2 ☐	-3 ☐	-4 ☐	-5 ☐	(29)
Mini-computers	-1 ☐	-2 ☐	-3 ☐	-4 ☐	-5 ☐	(29)
Personal computers	-1 ☐	-2 ☐	-3 ☐	-4 ☐	-5 ☐	(30)
Personal computer software	-1 ☐	-2 ☐	-3 ☐	-4 ☐	-5 ☐	(31)
Laser printers	-1 ☐	-2 ☐	-3 ☐	-4 ☐	-5 ☐	(32)
Dot matrix printers	-1 ☐	-2 ☐	-3 ☐	-4 ☐	-5 ☐	(33)
Desktop publishing systems	-1 ☐	-2 ☐	-3 ☐	-4 ☐	-5 ☐	(34)
Local area networks	-1 ☐	-2 ☐	-3 ☐	-4 ☐	-5 ☐	(35)
Telecommunication systems and equipment	-1 ☐	-2 ☐	-3 ☐	-4 ☐	-5 ☐	(36)
Dictating equipment	-1 ☐	-2 ☐	-3 ☐	-4 ☐	-5 ☐	(37)
Office copiers	-1 ☐	-2 ☐	-3 ☐	-4 ☐	-5 ☐	(38)

4. This question asks you to describe how you would participate in the decision-making process **if** your company were to purchase these products and systems. We would like you to consider the process to occur in five steps:

1. Initiation—Determining that there is a need for the product
2. Specification—Deciding which features and functions are needed
3. Evaluation—Gathering information about suppliers
4. Recommendation—Suggesting a type or brand
5. Authorization—Authorizing the purchase

For each of the products and systems, please "X" the columns that describe **how you would participate** in the decision to purchase. (PLEASE "X" AS MANY AS APPLY.)

	Initiation	Specification	Evaluation	Recommendation	Authorization	Not At All Involved	
Mainframe computers	-1 ☐	-2 ☐	-3 ☐	-4 ☐	-5 ☐	-6 ☐	(39)
Mini-computers	-1 ☐	-2 ☐	-3 ☐	-4 ☐	-5 ☐	-6 ☐	(40)
Personal computers	-1 ☐	-2 ☐	-3 ☐	-4 ☐	-5 ☐	-6 ☐	(41)
Personal computer software	-1 ☐	-2 ☐	-3 ☐	-4 ☐	-5 ☐	-6 ☐	(42)
Laser printers	-1 ☐	-2 ☐	-3 ☐	-4 ☐	-5 ☐	-6 ☐	(43)
Dot matrix printers	-1 ☐	-2 ☐	-3 ☐	-4 ☐	-5 ☐	-6 ☐	(44)
Desktop publishing systems	-1 ☐	-2 ☐	-3 ☐	-4 ☐	-5 ☐	-6 ☐	(45)
Local area networks	-1 ☐	-2 ☐	-3 ☐	-4 ☐	-5 ☐	-6 ☐	(46)
Telecommunication systems and equipment	-1 ☐	-2 ☐	-3 ☐	-4 ☐	-5 ☐	-6 ☐	(47)
Dictating equipment	-1 ☐	-2 ☐	-3 ☐	-4 ☐	-5 ☐	-6 ☐	(48)
Office copiers	-1 ☐	-2 ☐	-3 ☐	-4 ☐	-5 ☐	-6 ☐	(49)

5. Which of the following have been **purchased** by your company within the past **two years**?

	Yes, Purchased	No, Not Purchased	No Idea At All	
Mainframe computers	-1 ☐	-2 ☐	-3 ☐	(50)
Mini-computers	-1 ☐	-2 ☐	-3 ☐	(51)
Personal computers	-1 ☐	-2 ☐	-3 ☐	(52)
Personal computer software	-1 ☐	-2 ☐	-3 ☐	(53)
Laser printers	-1 ☐	-2 ☐	-3 ☐	(54)
Dot matrix printers	-1 ☐	-2 ☐	-3 ☐	(55)
Desktop publishing systems	-1 ☐	-2 ☐	-3 ☐	(56)
Local area networks	-1 ☐	-2 ☐	-3 ☐	(57)
Telecommunication systems and equipment	-1 ☐	-2 ☐	-3 ☐	(58)
Dictating equipment	-1 ☐	-2 ☐	-3 ☐	(59)
Office copiers	-1 ☐	-2 ☐	-3 ☐	(60)

6. For each of the office products and systems, please "X" the brand names that are currently used in your company. (PLEASE "X" ALL THAT APPLY.)

a) **MAINFRAME COMPUTERS**

61-1 ☐ Company doesn't have this equipment
-2 ☐ AMDAHL
-3 ☐ AT&T
-4 ☐ CONTROL DATA CORPORATION (CDC)
-5 ☐ DIGITAL EQUIPMENT CORPORATION (DEC)
-6 ☐ HEWLETT-PACKARD
-7 ☐ HONEYWELL BULL
-8 ☐ IBM
62-1 ☐ NCR
-2 ☐ PRIME COMPUTER
-3 ☐ TANDEM COMPUTERS
-4 ☐ ULTIMATE
-5 ☐ UNISYS
-6 ☐ Other _____ 63-
(please specify) 64-
-7 ☐ No idea at all

b) **MINI-COMPUTERS**

65-1 ☐ Company doesn't have this equipment
-2 ☐ BURROUGHS
-3 ☐ CONTROL DATA CORPORATION (CDC)
-4 ☐ DATA GENERAL
-5 ☐ DIGITAL EQUIPMENT CORPORATION (DEC)
-6 ☐ GOULD
-7 ☐ HEWLETT-PACKARD
-8 ☐ IBM
66-1 ☐ INTERGRAPH
-2 ☐ MODCOMP
-3 ☐ NCR
-4 ☐ PRIME COMPUTER
-5 ☐ WANG
-6 ☐ Other _____ 67-
(please specify) 68-
-7 ☐ No idea at all

c) **PERSONAL COMPUTERS**

69-1 ☐ Company doesn't have this equipment
-2 ☐ APPLE
-3 ☐ AT&T
-4 ☐ CANON
-5 ☐ COMMODORE
-6 ☐ COMPAQ
-7 ☐ DATA GENERAL
-8 ☐ DATAVUE
70-1 ☐ EPSON AMERICA
-2 ☐ IBM
-3 ☐ LEADING EDGE
-4 ☐ NEC
70-5 ☐ OLIVETTI
-6 ☐ QUADRAM
-7 ☐ PANASONIC
-8 ☐ SHARP
71-1 ☐ SONY
-2 ☐ TANDON
-3 ☐ TANDY (RADIO SHACK)
-4 ☐ TEXAS INSTRUMENTS
-5 ☐ TOSHIBA
-6 ☐ WANG
-7 ☐ Other _____ 72-
(please specify) 73-
-8 ☐ No idea at all

d) **PERSONAL COMPUTER SOFTWARE**

74-1 ☐ Company doesn't have this equipment
-2 ☐ ANALYTICA
-3 ☐ APPLIED DATA RESEARCH
-4 ☐ ASHTON-TATE
-5 ☐ BORLAND
-6 ☐ COMPUTER ASSOCIATES
-7 ☐ COMPUSERV
-8 ☐ DAYBREAK
-9 ☐ IBM
-0 ☐ LOTUS
75-1 ☐ MICROPRO
-2 ☐ MICRORIM
-3 ☐ MICROSOFT
-4 ☐ PAPERBACK PUBLISHING
-5 ☐ PILOT EXECUTIVE SOFTWARE
-6 ☐ WANG
-7 ☐ WORD PERFECT
-8 ☐ Other _____ 76-
(please specify) 77-
-9 ☐ No idea at all (80-1)

e) **LASER PRINTERS**

6-1 ☐ Company doesn't have this equipment
-2 ☐ APPLE
-3 ☐ CANON
-4 ☐ CORDATA
-5 ☐ DATA GENERAL
-6 ☐ DIGITAL EQUIPMENT CORPORATION (DEC)
-7 ☐ EPSON AMERICA
-8 ☐ HEWLETT-PACKARD
7-1 ☐ IBM
-2 ☐ KYOCETA
-3 ☐ NEC
-4 ☐ OKIDATA
-5 ☐ QMS
-6 ☐ WANG
-7 ☐ Other _____ 8-
(please specify) 9-
-8 ☐ No idea at all

7 Each of the following factors could be considered in purchasing **new** office products and systems. For each product or system listed across the page, please "X" all of the factors that you feel would be **important** to you in making the purchase (PLEASE "X" ALL THAT APPLY.) If you would not be involved at all in the decision to purchase that product or system, please "X" the box immediately below that particular product or system and go on to the next.

	Mainframe Computers	Mini-Computers	Personal Computers	Personal Computer Software	Laser Printers	Dot Matrix Printers	Desktop Publishing Systems	Local Area Networks	Tele-communication Systems & Equipment	Dictating Equipment	Office Copiers
NOT INVOLVED AT ALL	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Manufacturer's reputation	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Special features	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Noise level	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Ease of use	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Reliability	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Durability	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Brand loyalty	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Service	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Appearance	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
American-made	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Support staff recommendations	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Price	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Expert opinion	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Current product/system is obsolete	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Quality	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Always replace after a certain period of time	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Speed	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Compatibility with existing systems	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Expandability/ability to upgrade	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Memory size	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Performance	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Connectivity	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Cost of ownership, including service and training	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Networking ability	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Other (please specify):	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____
None of the above	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐

8 For each of the products and systems listed across the page, please indicate which **source** your company would use to purchase that product or system. If your company would **never** purchase that product or system, please "X" the box immediately below that particular product or system and go on to the next.

	Mainframe Computers	Mini-Computers	Personal Computers	Personal Computer Software	Laser Printers	Dot Matrix Printers	Desktop Publishing Systems	Local Area Networks	Tele-communication Systems & Equipment	Dictating Equipment	Office Copiers
COMPANY WOULD NEVER PURCHASE	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Directly from vendor	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Manufacturer's representative	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Value-added reseller	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Distributor	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Independent dealer	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Retail store	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Other (please specify)	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____
No idea at all	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐

(OVER)

9. Last, for classification purposes:

a. Approximately how many employees are there in your entire corporation or firm—that is, the total number of employees including all plants, divisions, branches and subsidiaries?

18-1 ☐ Fewer than 25
-2 ☐ 25-49
-3 ☐ 50-99
-4 ☐ 100-249
-5 ☐ 250-499
-6 ☐ 500-999
-7 ☐ 1,000-4,999
-8 ☐ 5,000-9,999
-9 ☐ 10,000 or more

b. What is the principle activity of the company (or division, if applicable) for which you work?

17-1 ☐ Manufacturing, processing, publishing
-2 ☐ Transportation, communications, utilities
-3 ☐ Mining, oil or gas extractions
-4 ☐ Construction
-5 ☐ Banking, finance, insurance, real estate
-6 ☐ Wholesale or retail trade
-7 ☐ Education
-8 ☐ Professional or business services (medical, accounting, data processing, consulting, etc.)
-9 ☐ Other: _____ 18-
(please specify)

c. What is your job title or position?

19-1 ☐ Chairman of the Board, President, CEO
-2 ☐ Vice President
-3 ☐ Chief Information Officer
-4 ☐ MIS Director
-5 ☐ Other Company Officer or General Manager
-6 ☐ Other Management
-7 ☐ Owner, Partner
-8 ☐ Professional (Doctor, Lawyer, etc.)
-9 ☐ Salesperson, Broker, Agent, Representative
-0 ☐ Trainee, Office Worker, Production Worker
-X ☐ Skilled Craftsman, Laborer
-7 ☐ Student
20-1 ☐ Retired
-2 ☐ Housewife
-3 ☐ Other: _____ 21-
(please specify)

d. In which state do you reside? _____ (22-23)

[80-3]

THANK YOU VERY MUCH!

FO1016

$1000 DRAWING ENTRY FORM

To qualify for the $1000 drawing, please complete this form and return it in the enclosed envelope, together with the completed questionnaire.

Name

Address

City State Zip Code

( )
Phone

Subject to the Rules and Regulations on the back of this form.

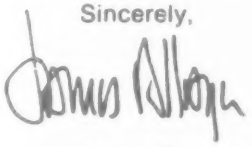
Drawing Regulations: The odds of winning the prize will depend on the number of the total distribution of 1000 entry forms which are timely received by us. Impartial drawing and selection of the winning entry, or alternate winning entry, if necessary, will be supervised by the accounting firm, Panfel, Merritt Co., whose decisions are final. Random drawing among all entries will take place on August 28, 1987. One prize will be awarded. Winner will be notified immediately by telephone and/or mail. Void where prohibited. Employees and immediate families of FORTUNE Magazine, Time Inc. and Beta Research Corp. are not eligible. Taxes on the prize will be the sole responsibility of the winner. Winner is required to execute an affidavit of eligibility and release, within 30 days after notification, otherwise an alternative winner will be selected by impartial drawing. If a prize notification letter or prize is returned by the Post Office as undeliverable, an alternative winner will be selected by impartial drawing. The $1000 check must be cashed within 60 days of receipt. The name of the winner will be available on request at Beta Research Corp., 6400 Jericho Turnpike, Syosset, New York 11791.

A few days ago we sent you a questionnaire about the office equipment your company uses and has purchased.

If you haven't filled it out yet, please take the time—right now, if possible—to complete the questionnaire and send it back to us.

If you have already done so, please accept our thanks for your cooperation.

Sincerely,



James B. Hayes
Publisher

Beta Research Corp.
Syosset, NY 11791

JOB #F01034
September 1987

OFFICE EQUIPMENT POLL TELEPHONE FOLLOW-UP STUDY

Hello, my name is _____ from Beta Research Corp. We have been asked by FORTUNE magazine to contact you regarding an extensive eight-page survey about your knowledge and use of various kinds of office equipment that was mailed to you a few weeks ago.

A. Did you receive this survey?

( ) Yes ( ) No --- SKIP TO TEXT BEFORE Q.#1

B. Did you fill it out and return it to us?

( ) Yes --- THANK AND TERMINATE

( ) No

May I have a few minutes of your time to ask you a couple of brief questions? Please remember that there are no right or wrong answers. We only want your honest and thoughtful replies.

1. I am going to read you a list of office products and systems. For each one I read, please tell me whether that product or system is currently used in your company.

READ BOTH PRODUCT/SYSTEM AND (DESCRIPTION):	CURRENTLY USED	NOT CURRENTLY USED	(DO NOT READ) NO IDEA AT ALL
MAINFRAME COMPUTERS (large, complex computer installations)	( )	( )	( )
MINI-COMPUTERS (mid-range computers for medium to high-level computational applications)	( )	( )	( )
PERSONAL COMPUTERS (small computers designed for individual use)	( )	( )	( )
PERSONAL COMPUTER SOFTWARE (programs for personal computers)	( )	( )	( )
LASER PRINTERS (printers which produce typeset quality characters)	( )	( )	( )
DOT MATRIX PRINTERS (printers which produce characters formed of dots which do not have the high-quality appearance produced by a typewriter or letter-quality printer)	( )	( )	( )
DESKTOP PUBLISHING SYSTEMS (combinations of hardware and software which enable the user to produce typeset-quality reports and presentations)	( )	( )	( )
LOCAL AREA NETWORKS (ways of linking a number of computers [in an office, for example] through communication lines so that they can share peripherals and data)	( )	( )	( )
TELECOMMUNICATION SYSTEMS AND EQUIPMENT (telephone systems for voice and/or data needs)	( )	( )	( )
DICTATING EQUIPMENT (voice recording and replay devices)	( )	( )	( )
OFFICE COPIERS (copying machines designed for general office use; not the large equipment used in central duplicating or printing departments	( )	( )	( )

2. How knowledgeable would you say you are about each of the following office products or systems? Would you say you are "VERY KNOWLEDGEABLE", "FAIRLY KNOWLEDGEABLE", "NOT TOO KNOWLEDGEABLE" or "NOT AT ALL KNOWLEDGEABLE"?

READ:

	VERY KNOWLEDGEABLE	FAIRLY KNOWLEDGEABLE	NOT TOO KNOWLEDGEABLE	NOT AT ALL KNOWLEDGEABLE
MAINFRAME COMPUTERS	( )	( )	( )	( )
MINI-COMPUTERS	( )	( )	( )	( )
PERSONAL COMPUTERS	( )	( )	( )	( )
PERSONAL COMPUTER SOFTWARE	( )	( )	( )	( )
LASER PRINTERS	( )	( )	( )	( )
DOT MATRIX PRINTERS	( )	( )	( )	( )
DESKTOP PUBLISHING SYSTEMS	( )	( )	( )	( )
LOCAL AREA NETWORKS	( )	( )	( )	( )
TELECOMMUNICATION SYSTEMS AND EQUIPMENT	( )	( )	( )	( )
DICTATING EQUIPMENT	( )	( )	( )	( )
OFFICE COPIERS	( )	( )	( )	( )

3. Please tell me how important your opinion is if your company were to make a decision to purchase the following products and systems? Would you say your opinion is "VERY IMPORTANT", "FAIRLY IMPORTANT", "NOT TOO IMPORTANT", or "NOT AT ALL IMPORTANT"?

READ:

	VERY IMPORTANT	FAIRLY IMPORTANT	NOT TOO IMPORTANT	NOT AT ALL IMPORTANT	(DO NOT READ) NO IDEA AT ALL
MAINFRAME COMPUTERS	( )	( )	( )	( )	( )
MINI-COMPUTERS	( )	( )	( )	( )	( )
PERSONAL COMPUTERS	( )	( )	( )	( )	( )
PERSONAL COMPUTER SOFTWARE	( )	( )	( )	( )	( )
LASER PRINTERS	( )	( )	( )	( )	( )
DOT MATRIX PRINTERS	( )	( )	( )	( )	( )
DESKTOP PUBLISHING SYSTEMS	( )	( )	( )	( )	( )
LOCAL AREA NETWORKS	( )	( )	( )	( )	( )
TELECOMMUNICATION SYSTEMS AND EQUIPMENT	( )	( )	( )	( )	( )
DICTATING EQUIPMENT	( )	( )	( )	( )	( )
OFFICE COPIERS	( )	( )	( )	( )	( )

4. Approximately how many employees are there in your entire corporation or firm --- that is, the total number of employees including all plants, divisions, branches and subsidiaries? Would you say...

READ:

( ) Fewer than 25
( ) 25 - 49
( ) 50 - 99
( ) 100 -249
( ) 250 - 499
( ) 500 to 999
( ) 1,000 - 4,999
( ) 5,000 - 9,999
( ) 10,000 or more

5. I am going to read you a list of job titles and/or positions. Would you please tell me which one best describes your job title? (INTERVIEWER NOTE: ONLY RECORD ONE ANSWER.)

READ:

( ) Chairman of the Board, President, CEO
( ) Vice President
( ) Chief Information Officer
( ) MIS Director
( ) Other Company Officer or General Manager
( ) Other Management
( ) Owner, Partner
( ) Professional (Doctor, Lawyer, etc.)
( ) Salesperson, Broker, Agent, Representative
( ) Trainee, Office Worker, Production Worker
( ) Skilled Craftsman, Laborer

( ) Student
( ) Retired
( ) Housewife
( ) Other: _____
(please specify)

THANK YOU VERY MUCH!

( ) LIST A (RENEW)

( ) LIST B (NEW)

RESPONDENT'S NAME: _____ INTERVIEWER: _____

ADDRESS: _____ VERIFIED BY: _____

_____

TELEPHONE NUMBER: ( ) _____

DAY OF INTERVIEW:

( )MON ( )TUES ( )WED ( )THURS ( )FRI ( )SAT ( )SUN

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